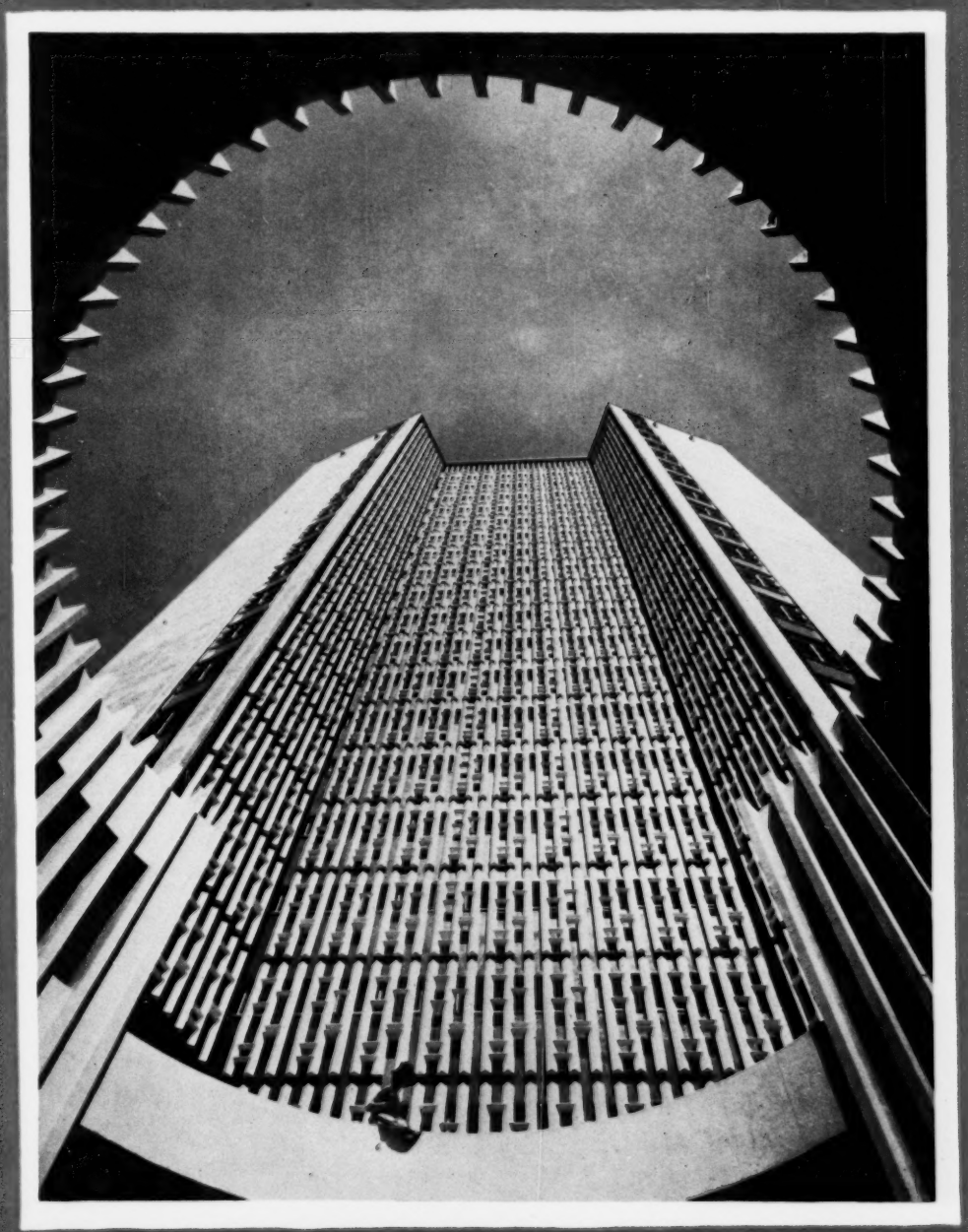
Board of Trade Journal

Volume 183, No. 3417 14 September 1962



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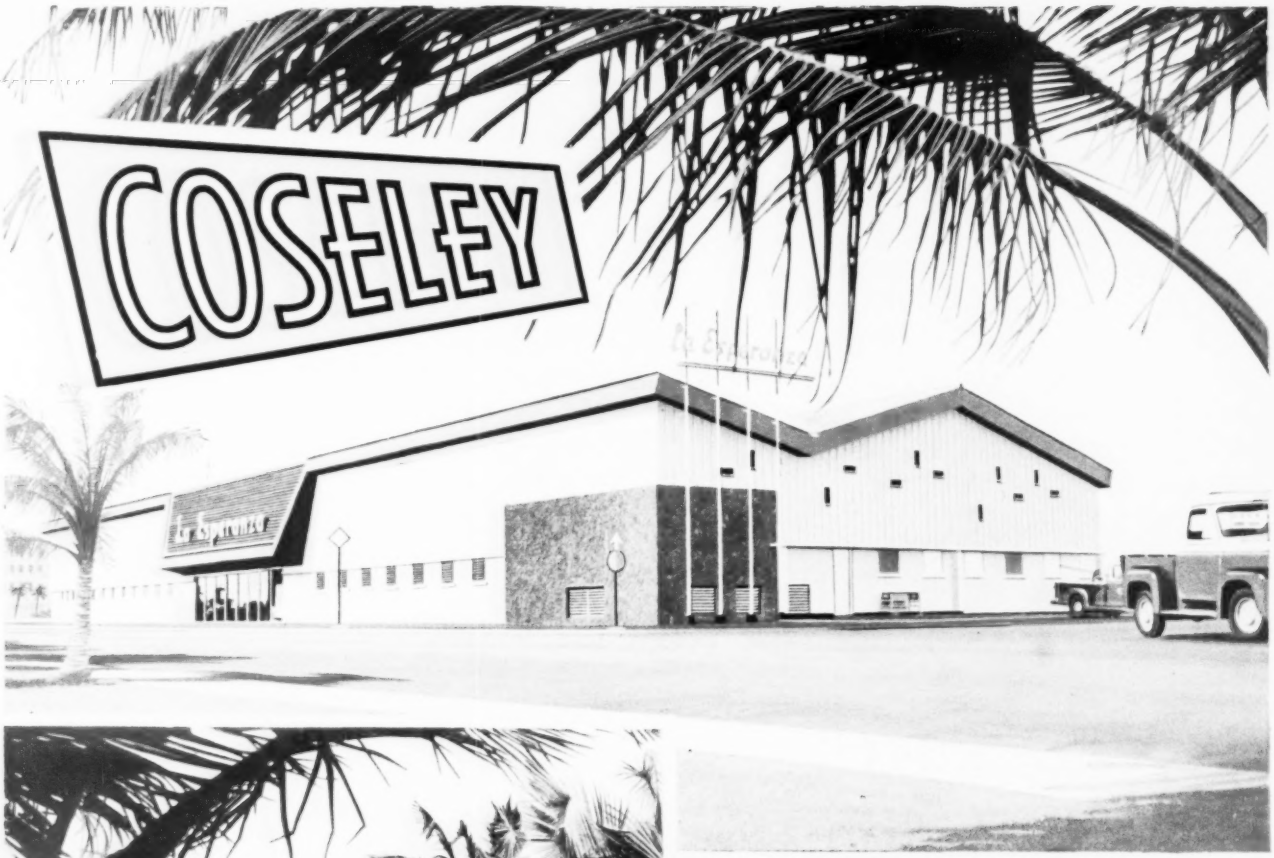

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BRANCHES AND AGENTS THROUGHOUT THE WORLD

Board of Trade Journal

Volume 183, No. 3417 | 14 SEPTEMBER 1962 | Price 1s. 3d. net

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British Construction Work Overseas In 1961-62

THE VALUE OF WORK done during the year ended March 1962, by over 60 British building and civil engineering firms operating in 62 different overseas countries, was £113 million compared with £135 million in the year before.

New contracts obtained during the year amounted to £122 million, some £24 million more than in the preceding year which was, however, the lowest recorded since 1955. The current figure is still some £9 million lower than the peak of £131 million recorded in 1959/60 but nevertheless is a welcome reversal of last year's trend. The increase is not due to a spectacular advance in any one country; in the sterling area, for example, steady improvements in most countries are recorded, apart from Australia, where the previous year's figures were, however, remarkably high. About £7.5 million of work was outstanding in Australia in March this year. It is reported, however, that contractors have been active there and that the results of their initiative should be reflected in next year's figures. More contracts have again been obtained in Canada in particular and the other dollar countries generally and the figures have improved in the EFTA and E.E.C. countries. There was also an improvement in South Africa and Nigeria after last year's disappointing figures.

The table below shows the distribution of activities of British construction firms overseas during the last three years.

The value of work outstanding in March was nearly £105 million, £5 million more than last year. No doubt the reduction in the load on the industries at home and the extra facilities for credit have played a part in helping contractors to obtain more work. There are therefore good grounds for hoping that next year's figures will show continued improvement.

At present very little work is undertaken in Europe by British firms. In the event of our entry into the Common Market opportunities may perhaps increase; in the meantime one major British contractor (Richard Costain) has opened an office in Brussels to offer a service to industrialists and property developers. A comprehensive service, ranging over the whole field of building from initial site selection to the handing over of a completed building is offered.

A wide variety of work was carried out during the year and the new contracts gained ensure that this feature of overseas activity will be maintained. Projects range from bridges and harbours to power stations, completely equipped factories, housing estates, hospitals, schools and universities, dams, office blocks, hotels, roadways – in fact most branches of building and civil engineering – many of which entail the solution of difficult problems posed by unfavourable terrain, climate and differences in labour conditions overseas.

Among the jobs obtained last year was the contract for a dam and hydro-electric power station on the Rio Sali near San Miguel de Tucuman in Argentina, awarded to Richard Costain and English Electric. Costain's civil engineering work on the project includes the construction of the main earth fill dam and three subsidiary dams. English Electric, George Wimpey & Co. and Siemens-Schuckertwerke A.G. of West Germany form the international consortium which has signed a basic agreement covering works to the value of £30 million on the Mantaro River hydro-electric scheme in Peru. The project includes the

£ million

	Total value of Contracts obtained in the year ended			Estimated value of work done in the year ended			Value of work outstanding at		
	March 31, 1960	March 31, 1961	March 31, 1962	March 31, 1960	March 31, 1961	March 31, 1962	March 31, 1960	March 31, 1961	March 31, 1962
Sterling	76	55	67	72	80	65	81	59	59
Dollar	40	27	41	33	35	34	29	20	27
Non-Sterling Western European	1	1	0*	3	1	1	1	1	0*
Other non-sterling	14	15	14	16	19	13	22	20	19
Total	131	98	122	124	135	113	133	100	105

*Less than £½m.

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Editorial Communications should be addressed to the Editor, *Board of Trade Journal*, Room 2410, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone: Trafalgar 8855, Ext. 2192.) Address for telegrams and cables 'Boneblack, London'.

The views expressed in contributions to the Journal emanating from other than official sources are not necessarily those of H.M. Government.

Advertisements. Inquiries from the London Postal Area concerning the insertion of advertisements should be addressed to H.M. Stationery Office, Room D.63, Atlantic House, Holborn Viaduct, London, E.C.1. (City 9876—Ext. 147.) Inquiries from other parts of the United Kingdom should be addressed to Cowlishaw and Lawrence (Advertising) Ltd., Memorial Hall Bldgs., 16 Farringdon St., London, E.C.4. (Telephone: City 3718.)

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Orders and remittances for reprints should be addressed to the Director of Publications (P.2), H.M. Stationery Office, Atlantic House, Holborn Viaduct, London, E.C.1. Cheques should be made payable to H.M. Paymaster-General.

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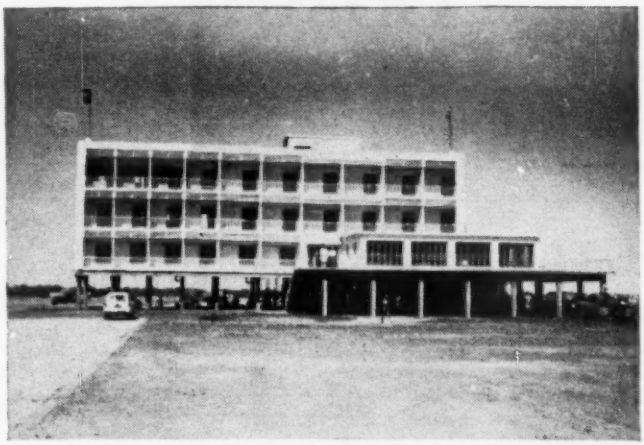
Front Cover Photograph

Seen through a 'key-hole' of graceful columns, one of Salisbury's newest buildings, Livingstone House, built by Richard Costain (Africa) Ltd., stretches impressively into the brilliant blue of the Central African sky. The value of the contract totalled £700,000. Structural engineers were Kass, Chatterton & Partners. Architects—Dennis Lennon of London, in association with W. D'Arcy Cathcart & Son, Creasy & Fothergill, Salisbury.

British Construction Work Overseas (*Continued*)



A British consortium, with Marples Ridgway and Partners as the main constructors, are the contractors for a £6 million textile mill in Khartoum, which is being equipped with British plant and machinery. The factory will provide 14 acres of covered space on two floors and will be completed this year. Seen here is the hostel built to accommodate specialist machine operators who will be training local labour.

construction of access roads, a tunnel, dam and power station which will include some of the largest hydro-electric generating plant in Latin America. Costain's have been very active in Libya, in Kenya and in Kuwait, amongst other places, on projects ranging from the erection of a bank to cleaning and wrapping 55 miles of steel pipe.

Constructors John Brown Ltd. continue to operate over a wide field. The fertilizer plant at Shiraz, Persia (illustrated in last year's review of overseas acivities) has started operating and work is in progress on four chemical plants for Russia and a £1 million sea water distillation plant to supply British Army and Royal Air Force units in the Dhekelia area in Cyprus.

John Laing & Son Ltd. have a wide variety of projects in hand in Canada through their Canadian companies, including a large bridge near Vancouver and a $6 million shopping centre development in Victoria, British Columbia. Work is also progressing on civil engineering and building works on the African continent.

Amongst the many activities of the Taylor Woodrow Group is the construction of Arcon buildings of which 70 per cent. of the production is exported. Arcon buildings, it is claimed, are now in 120 countries abroad and some of the more important contracts obtained include a jute mill for Thailand, three cotton spinning mills in Indonesia, a textile printing works in Ghana and 29 military buildings for Malaya. The New Zealand Government have awarded a subsidiary of the Group, in association with Wilkins and Davies Construction Co. of New Zealand, a contract worth about £2.75 million for the construction of a new international airport at Auckland. This will enable New Zealand, for the first time, to accept the largest passenger jet aircraft and will make a big improvement in the air travel facilities. The contract was obtained in the face of considerable competition.

The steps taken during the year under review to improve financial arrangements and E.C.G.D. cover to enable British contractors to tender competitively in overseas markets have been generally welcomed. In some parts of the world the political situation remains uncertain and competition for the construction work in the stable areas is extremely keen. More opportunities may well be found in a greater diversification of interests and, for example, by amalgamation with foreign competitors operating in the same market but in complementary fields.

Many British firms are now associated with local firms in the countries in which they are working. Among these is the associate company of Holland, Hannen & Cubitts (Anglin-Norcross (Ontario)) Corporation which completed, four months' ahead of schedule, a $12½ million (about £4.6 million) hospital at Cedar Springs, Ontario. The hospital is a completely self-contained unit with its own power plant, laundry and electrical station, and provides hospital and residential accommodation for all types of retarded children. The company has been awarded

BoT Minister in House of Lords

THE APPOINTMENT of Lord Derwent as a Minister of State, Board of Trade, was announced from the Prime Minister's office on September 6.

Lord Derwent, who was born in 1901, has been chairman of the British Road Federation since 1954 and is a director of insurance and trustee companies.

Mr. DAVID PRICE AT DESIGN CENTRE

Mr. David Price (*left*), Parliamentary Secretary, Board of Trade, examining exhibits at the Design Centre, London, during his recent visit. With him is Mr. Paul Reilly, Director of the Council of Industrial Design.

Business Monitor : Production Series

THE FOLLOWING title and issue of Business Monitor Production Series is now available, and copies may be obtained by annual subscription from H.M. Stationery Office, P.O. Box 569, London, S.E.1:

Monthly at £1 a year, post free:
Rubber for June, 1962.

SUPPLEMENT ON RHODESIA AND NYASALAND

In the supplement on 'The African Customer in Rhodesia and Nyasaland' enclosed with this issue, there is one minor error in Appendix D (page 28). The section 'Agricultural and Related Workers' should read as follows:

Agricultural and Related Workers			
Agricultural workers . . .	3,220	—	2.14.0
Gardeners, groundsmen and stable boys (excluding private domestic servants)		6.10.0	4.3.0

On page 16 of the Supplement, the following paragraph should be added to the section sub-headed 'Local Manufacturing Industry and its Influence on Imports':

'In order to stimulate the production of locally made goods and in order to relieve unemployment, the import duties on a fairly wide range of imported goods, principally clothing, footwear, textiles, iron and steel, food and furniture, have recently been increased (see page 534 of the *Board of Trade Journal* for September 7, 1962). This may well mean a strengthening of the competitive position of local manufacturers in relation to British and other exporters but it may also have the effect of causing customers who wish to continue to buy the imported article to switch their preference from South Africa to Britain. If the increased duties achieve their object of increasing local production and relieving unemployment, however, the effect in the long term will be beneficial to British exporters. If national income rises so will purchasing power and the trend, as in other developing countries, should therefore be for imports to rise in response to increased internal demand.'

Statistical Inquiry into Assets of Superannuation and Pension Funds

AS PART of the programme to implement the recommendations on statistics included in the Radcliffe Report on the Working of the Monetary System, the Board of Trade is to conduct new statistical inquiries into the financial assets of superannuation and pension funds. The first of these inquiries will relate to purchases and sales of financial assets by funds in the fourth quarter of 1962.

In addition to seeking quarterly information about transactions in assets, the Board of Trade is planning to ask funds once a year about their holdings of assets. Statistics about the assets of local authority pension funds and those of other public bodies is already published in the new statistical bulletin *Financial Statistics*.

The Board of Trade has consulted the Association of Superannuation and Pension Funds, and the officers of a number of pension funds, about the details of the questionnaire which is being sent out. Information relating to an individual fund will be treated in strict confidence by the Board of Trade and will be used only for compiling statistics of the assets of pension funds as a group.

British Construction Work Overseas (*Continued*)

also the $23 million contract for the construction of Toronto's new city hall to a design chosen in competition from over 500 entries from 42 countries, and a £1½ million contract for additions to the King Edward VII Memorial Hospital at Paget Parish in Bermuda.

In another case which followed the showing in 1960 in Milan of a school constructed by a system designed for the Consortium of Local Authorities Special Programme (C.L.A.S.P.), Brockhouse Steel Structures Ltd., manufacturers of the steel frames on which the buildings are based, have set up subsidiaries in both West Germany and Italy for their production under licence. Prospects of sales appear to be particularly promising in both countries and in Italy the second contract for schools has been negotiated. In West Germany the first contract for barracks for the British War Department is being followed up by a programme for schools.

Although not strictly building and civil engineering construction activity, it is of interest to note that during the year under review two United Kingdom companies, J. G. Gammon (England) Ltd. and Pegson Ltd. of Coalville, Leicestershire, were awarded a £5¼ million contract for the supply from local materials of about 6 million tons of crushed aggregate for the Indus Basin project of dams, barrages, bridges and canals, for which plant will be sent from home. Pegson Ltd. will supply nearly £1 million of British equipment for the production of the stone and this is the first occasion the firm have entered the practical quarrying field since in the past their activities have been confined to manufacturing and supplying quarrying machinery. A feature of the contract is that it was won against competition from many other countries.

Coseley Buildings of Wolverhampton are supplying seven pre-engineered steel frame buildings for use as warehouses and customs sheds in the new port of Um Qasr, Iraq, which is being constructed by a Swedish firm. William and Williams of Chester supplied aluminium curtain walling for incorporation in the Kuwait Municipal Centre and the Crittall Manufacturing Company Ltd. will be opening a new factory near Kuala Lumpur, Malaya, this year, for the manufacture of standard Crittall windows and the assembly of purpose-made aluminium windows and curtain walling components made in Britain. This company has also supplied many contracts in the Federation, including all the curtain walling for the Overseas Union Bank building in Kuala Lumpur, the first of its kind in Malaya.

Imports of Butter from Denmark for the Period October 1, 1962-February 28, 1963

THE BOARD OF TRADE, in Notice to importers No. 1014 dated September 13, 1962, announced that the arrangements made for licensing imports of butter from Denmark will continue on the present lines for the period after September 30, 1962, when current licences expire. New licences, which should now be applied for as soon as possible, will cover imports during the five months from October 1, 1962, to February 28, 1963.

As before, the licences should provide adequately for such supplies of butter as Denmark may wish to export during the period. They are intended neither to represent the entitlements of individual importers nor to be restrictive, but merely to facilitate the allocation arrangements of the Danish authorities.

Holders of licences should apply on form TIP/A (or ILB/A) for licences to cover imports for the forthcoming period. Applicants who wish to effect entry at more than one port should make out separate application forms for each port, indicating in a covering letter the proportion of their total allocation which they estimate will be required for each such port. Page 1 of the form should be completed and page 2 left blank; on page 3 and copies, the applicant's name and address, the description of goods (butter) and the country of origin and consignment (Denmark) should be entered.

Licences expiring on September 30, and still in the possession of the applicant at that date should be returned to the Tariff and Import Policy Division of the Board of Trade as soon as possible thereafter. Failure to return them may prejudice the issue of further licences. If the expired licence has been fully used and therefore retained by Customs, a statement to this effect should be sent to the Board, and it will not be necessary for importers to forward the licence itself.

Anti-Dumping Duty Application on Lithium Hydroxide and Lithium Carbonate

THE BOARD OF TRADE give notice that they are considering an application for the imposition under the Customs Duties (Dumping and Subsidies) Act, 1957, of anti-dumping duties on lithium hydroxide and lithium carbonate imported from the United States of America and the Federal Republic of Germany. The application may be extended to include imports of these products from other countries at prices which appear to be dumped or subsidised.

Any representations which interested parties may wish to make in connection with this application should be submitted in writing, not later than September 28, 1962. A statement of the applicants' case will be made available to all interested parties who wish to make representations in the matter if they are prepared to give an undertaking to treat the information contained therein as strictly confidential and to allow their comments to be passed to the applicants for reply. Requests for a statement of the case, together with an undertaking in the terms set out above, should be addressed in writing to the Tariff and Import Policy Division, Board of Trade, Room 3136, Horse Guards Avenue, London, S.W.1.

Somerset Firm's Plans at Prudhoe

THE FOLLOWING announcement was issued by the Board of Trade Regional Office, Newcastle, on September 4:

'Engineering Productions (Clevedon) Limited, Clevedon, Somerset, announce a change in their plans to establish a factory at Prudhoe, Northumberland. In their original statement on April 1, 1962, they said they were to build a branch factory at Prudhoe, but since that date it has been announced that Imperial Chemical Industries Limited are to close their Fertilizer Works at Prudhoe. It has now been agreed between Imperial Chemical Industries Limited and Engineering Production (Clevedon) Northern Ltd., a subsidiary company formed for this purpose, that the latter will acquire, with the assistance of the Board of Trade, some of the existing buildings to the west of the entrance to the I.C.I. factory at Prudhoe. This will enable the company to commence production at an earlier date than would have been possible if they had proceeded with the earlier proposal to build an entirely new factory.'

Applications for Temporary Exemption from Import Duty

THE BOARD OF TRADE are considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers, who consider they are, or will be, within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production. Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed. Letters, giving the respective reference shown below, should be addressed to Tariff and Import Policy Division, Board of Trade, Horse Guards Avenue, London, S.W.1, preferably through a Trade Association, and should be received by September 28, 1962.

Tariff Heading	Proposed Definition for Tariff Purposes	Applied For as	Exemption Requested until	Reference
29.02	$\alpha\alpha'$-Dibromo-*o*-xylene	$\alpha\alpha'$-Dibromo-o-xylene	December 31, 1963	5093
29.02	$\alpha\alpha'$-Dibromo-*m*-xylene	$\alpha\alpha'$-Dibromo-m-xylene	December 31, 1963	5094
29.02	$\alpha\alpha'$-Dibromo-*p*-xylene	$\alpha\alpha'$-Dibromo-p-xylene	December 31, 1963	5095

Anti-Dumping Duty Application on Phthalic Anhydride

THE BOARD OF TRADE gave notice on August 10, 17 and 24 (see *Board of Trade Journal*, August 24, 1962, page 407) that they were considering an application for the imposition under the Customs Duties (Dumping and Subsidies) Act 1957 of anti-dumping duties on phthalic anhydride imported from Austria, Belgium, Denmark South Africa and the Federal Republic of Germany. The Board of Trade now give notice that the application has been extended to cover imports from Poland. The application may be further extended to include imports of this product from other countries at prices which appear to be dumped or subsidized.

Any representations which interested parties may wish to make in connection with this application should be submitted in writing not later than September 28. A statement of the applicants' case will be made available to all interested parties who wish to make representations in the matter if they are prepared to give an undertaking to treat the information contained therein as strictly confidential and to allow their comments to be passed on to the applicants for reply. Requests for a statement of the applicants' case should be addressed in writing to the Tariff and Import Policy Division, Board of Trade, Room 3134, Horse Guards Avenue, London, S.W.1.

Import Duties Act, 1958

AS REQUIRED by Section 4 of the Import Duties Act, 1958, the Board of Trade have laid before Parliament a report on the exercise of their powers under the Act, during the year ended March 31, 1962.

The report (H. of C.277), which is the third to be made under the Act, gives details of orders made, during the period under review, to vary import duties and to allow exemptions and reliefs from duty (including drawback of duty on exportation). It also gives details of unsuccessful applications for changes in import duties, and of the value of goods which benefited from various existing provisions for relief from duty.

Copies may be obtained from H.M. Stationery Office, (price 1s. 6d.).

Gold and Convertible Currency Reserves

H.M. TREASURY announce that the gold and convertible currency reserves fell by £24 million to stand at £1,017 million on August 31, 1962.

Millionth Diesel Engine for Export

THE PRODUCTION of the millionth Perkins export diesel engine was the occasion of a considerable celebration at the factory of F. Perkins Limited, Peterborough, on September 5. The Perkins Group already have one of the best export performances in Britain and in honour of this particular export event, the firm arranged for a special train to convey guests from London to Peterborough.

Rising to the occasion British Railways brought out one of their thoroughbred steam locomotives to haul the train, the 'Falcon', A.4 Pacific class (Doncaster 1937) sister to the 'Mallard' which holds the world's speed record for steam locomotives (over 125 m.p.h. July 28, 1938). The train was seen off by the King's Cross station-master in full regalia.

Mr. Frederick Erroll, President of the Board of Trade, was guest of honour at the luncheon. He said that the internal combustion engine manufacturing industry of Great Briain in recent years had put up a splendid performance in a highly competitive world market.

This industry had been making rapid and large progress in some of the toughest of export markets, including particularly the countries within the Common Market. The industry as a whole was probably exporting – directly and indirectly – something not far short of 80 per cent. of its production.

'In this lively and progressive industry, the Perkins' Group occupies a most notable position', the President continued. 'Many of you may be surprised, as I was, to be reminded that the company is only 30 years old, and began with a handful of people and a capital of £10,000. Today it is producing up to 1,000 engines a day, and had a turnover last year of some £30 million. The company's exports are continuing to grow in spite of the competition of the world market. The company's technical, manufacturing and commercial achievements and standards must be high indeed when it can sell on such a large scale to so many of the leading motor vehicle and tractor manufacturing concerns around the world.

'Although so much must depend on the quality of a company's manufacturing plant and equipment – and on the readiness of peop'e to invest in the enterprise – there are the equally important determining factors of the quality of the men working together in the company – the people on the factory floor, the supervisory and management staffs, the design and technical staffs. This must be a very proud day for all those who have contributed to the success of this important enterprise.'

Jordanian Mission to Britain

DOCTOR Kamal Sha'er, Vice-Chairman of the Jordan Development Board, and Doctor Nejmeddin Dajani, Head of the Planning Division of the Development Board, visited Britain from September 6 to 12, 1962. Whilst in this country they were guests of the Board of Trade.

Doctor Sha'er and Doctor Dajani passed through Britain on their way to a meeting of the International Bank in Washington, and took the opportunity to discuss the future economic development of Jordan with senior Government officials and leading industrialists. Included in the official programme were meetings with the Foreign Office, Treasury, Board of Trade, Bank of England, Department of Technical Co-operation, representatives from industry and consulting engineers.

Canadian Motor Dealers Visit Britain

A party of 25 motor dealers from the Provinces of Nova Scotia and Prince Edward Island will visit Britain from September 14 to October 1. A programme has already been arranged for the party up to September 22 but any British manufacturers of motor car accessories interested in contacting the party after this date should get in touch either with Mr. D. V. MacQuarrie or Mr. R. H. Carter, c/o The Kensington Palace Hotel, De Vere Gardens, W.8. (Telephone Western 8121). Alternatively contact can be made through Mr. G. A. Hope, Office of the Agent General, Canadian Atlantic Provinces, 60 Trafalgar Square, London, W.C.2. (Telephone: Whitehall 8718.)

Sales by Wholesale Textile Houses in July

SALES by wholesale textile houses in July showed a decrease on a year earlier of 3 per cent. Sales in the first and second quarters of the year were lower by 7 and 2 per cent. respectively.

Stocks held by wholesale textile houses were down in value by 3 per cent. on a year earlier.

Note:

These statistics are prepared by the Wholesale Textile Association. Inquiries should be addressed to: The Secretary, The Wholesale Textile Association, 75 Cannon Street, London, E.C.4. (Telephone: City 4444.)

Total Sales and Stocks

Index Numbers (average 1950 = 100) and Percentage Changes Compared with a Year Earlier

	Value of Sales (Total Home Trade)		Value of Stocks (at end period) (b)	
		%		%
1960 Year	106	+ 6	...	...
1961 Year	107	+ 1	...	...
1961 1st quarter	101	+ 9	136	+ 7
2nd quarter	100	— 4	127	+ 4
3rd quarter	102	+ 3	146	+ 10
4th quarter	125	— 2	115	+ 5
1962 1st quarter	94	— 7	139	+ 3
2nd quarter	98	— 2	127	— 2
1961 October	141	— 1	133	+ 11
November	128	— 1	129	+ 8
December	103	— 4	115	+ 5
1962 January	70	— 1	121	+ 1
February	91	— 4	137	— 1
March	122	— 11	139	+ 3
April	98	— 4	132	+ 1
May	107	+ 4	129	— 1
June	87	— 6	127	— 2
July	73	— 3	133	— 3

Analysis by Department

Percentage of Corresponding Values for 1961

	Sales (b)		Stocks (b)
	July	Jan-July	At end of July
Women's knitted outerwear, blouses and skirts	95·1	92·1	87·7
Women's coats, costumes, furs, and raincoats	85·9	86·4	104·2
Women's underwear	89·8	95·2	99·9
Women's hose and children's socks	93·9	98·3	121·6
Women's millinery	88·3	95·3	94·4
Haberdashery, ribbons and wool	114·1	101·7	103·6
Children's wear	97·7	93·1	95·1
Men's and boys' shirts, pyjamas and outfitting	104·1	94·0	90·4
Gloves	95·9	97·5	83·7
Piece-goods and nets	90·0	88·7	92·8
Household textiles	94·3	97·5	89·9
Floor-coverings, furniture and hardwear	98·8	95·3	99·0
Grand total (a)	96·6	95·8	97·1

Notes:
(a) Including some items not included among the sub-headings.
(b) Valued at cost.

Rubber Stockpile Disposals

THE AVERAGE market price in August having been less than 23½ pence a pound 700 tons of rubber from the Board of Trade's stockpile has been sold this month for delivery as follows:

October	130 tons
November	325 tons
December	245 tons

Approximately 16,400 tons of rubber remain in the stockpile.

Plastics Bibliography

'Plastics' (E. R. Yescombe) is another in the series of the Library Association's Special Subject Lists. Copies: The Library Association, Malet Place, London, W.C.1. Price 8s. (6s. to members).

Textile Statistics for July

Deliveries in the Made-up Clothing Industry

MANUFACTURERS' sales of made-up clothing in July were 8 per cent. less than in July 1961. This is a sharper rate of decline compared with a year earlier than the average for the three previous months but too much should not be read into the comparison for a month in which the incidence of annual holidays may have had some effect.

Deliveries in all sectors of the industry were less than they were a year earlier. Deliveries of dresses, lingerie and infants' wear were 10 per cent. less and weatherproof outerwear and overalls and men's shirts, underwear, etc. were 8 and 7 per cent. less respectively.

The index numbers below which are of manufacturers' sales at constant prices, have been adjusted for the length of the working month but not for holidays or other seasonal factors.

Made-up Clothing Industry – Index Numbers of Production.
(1958 = 100)

	Men's and boys' tailored outerwear	Women's and girls' tailored outerwear	Weather-proof outerwear	Dresses, lingerie, infants' wear, etc.	Overalls and men's shirts, under-wear, etc.	Total
1960	117	122	134	126	122	122
1961	122	126	134	128	117	125
1961 2nd quarter	128	102	130	127	120	122
3rd quarter	116	147	147	123	111	126
4th quarter	122	115	121	124	121	121
1962 1st quarter	121	142	121	134	112	127
2nd quarter	125	96	117	117	115	115
1961 May	121	94	122	129	116	118
June	132	89	128	111	117	116
July	123	131	139	121	110	124
1962 May	125	87	113	123	114	115
June	122	83	118	103	117	109
July	116	121	128	109	102	114

Production in the Cotton Industry

THE VOLUME of production in the cotton industry in July, compared with the corresponding month last year, was 14 per cent. less. In the previous three months, April-June, taken together, the volume of production was also 14 per cent. less than a year earlier.

Statistics issued by the Cotton Board show that, compared with last year, output of single yarn and the amount of yarn doubled in the first seven months of the year was 13 and 7 per cent. less respectively. The amount of cloth woven was 11 per cent. less.

Yarn and Cloth Production
(All figures are weekly averages)

	Single yarn (a)		Doubled yarn		Woven cloth	
	Cotton yarn (b)	Spun man-made fibre yarns and mixture yarn, inc. waste	Cotton yarn	Other	Cotton	Man-made fibre and mixtures
	Mn. lb.	Mn. lb.	Mn. lb.	Mn. lb.	Mn. lin. yds.	Mn. lin. yds.
1958†	11·91	2·86	3·07	1·32	27·0	11·3
1959	11·66	2·92	3·18	1·49	24·7	11·4
1960	11·46	2·98	3·30	1·66	24·9	11·9
1961	10·66	2·55	2·82	1·52	23·8	11·7
1961 July	9·59	2·18	2·65	1·48	16·1	8·5
August*	9·92	2·48	2·26	1·29	23·1	10·7
September	10·00	2·41	2·76	1·64	23·0	11·7
October	10·97	2·61	2·94	1·59	25·0	12·7
November*	10·82	2·56	2·98	1·61	24·4	12·6
December	8·78	2·07	2·42	1·32	20·3	10·9
1962 January*	9·98	2·39	2·60	1·54	22·0	11·9
February	10·40	2·48	2·81	1·60	22·8	12·2
March	10·32	2·55	2·80	1·68	22·3	12·2
April	8·96	2·25	2·46	1·47	20·3	10·8
May*	10·28	2·56	2·71	1·67	22·3	11·7
June	8·87	2·19	2·43	1·54	20·7	10·7
July	7·56	1·76	2·18	1·63	13·7	8·2

(a) Spun in the cotton industry. (b) Including yarns wholly of cotton and of cotton waste, cotton yarn spun on condenser system and mixture yarns of cotton and cotton waste.
* Average of five weeks. † 53-week period.

Output of the Wool Textile Industry

THE VOLUME of production in the wool textile industry in July was 10 per cent less than a year earlier.

Figures issued by the Wool Industry Bureau of Statistics show that production of tops was 1 per cent. more than in June but 17 per cent. less than in July last year. Compared with last year deliveries in July of worsted yarn and woven fabrics (excluding blankets) were 13 and 10 per cent. less respectively. As the incidence of annual holidays affected districts and processes in varying degrees the comparisons, however, should be interpreted with caution.

In the first seven months of the year deliveries of both worsted yarn and woven fabrics (excluding blankets) were 8 per cent. less.

Output of the Wool Textile Industry

	Con-sumption	Production		Deliveries			
	Raw wool (clean weight)	Tops (a)	Woollen yarn (b)	Worsted yarn	Woven fabrics (excluding blankets) (c)		Blankets (b)
					Woollen	Worsted	
Quarterly average	Mn. lb.	Mn. lb.	Mn. lb.	Mn. lb.	Mn. sq. yds.	Mn. sq. yds.	Mn. sq. yds.
1958	111·1	74·2	72·0	51·6	48·7	38·5	7·1
1959	127·3	87·1	78·3	58·0	51·6	39·7	7·7
1960	120·3	79·8	75·8	61·2	49·4	42·4	7·8
1961	118·0	80·0	70·3	61·6	45·8	42·2	8·4
1961 1st quarter	125·5	86·2	74·0	64·4	45·0	46·4	8·6
2nd quarter	124·5	85·5	71·0	62·7	45·8	41·0	6·5
3rd quarter	106·0	72·1	64·0	56·4	46·1	37·7	8·4
4th quarter	115·9	76·4	72·0	62·6	46·4	43·6	10·0
1962 1st quarter	121·5	80·9	75·0	60·7	40·9	43·5	8·1
2nd quarter	113·2	73·1	76·0	56·1	42·9	36·0	6·6
1961 May	42·5	28·7	..	21·1	15·4	14·0	2·1
June	44·3	30·9	..	22·4	18·1	14·7	2·5
July	39·5	28·6	..	19·8	16·2	13·3	2·2
1962 May	42·3	27·9	..	21·2	16·4	14·0	2·3
June	35·2	22·4	..	17·3	15·0	11·0	2·3
July	35·8	25·0	..	18·1	16·3	11·7	2·1

(a) Including hair. (b) Estimated. (c) Woven, woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components.

Orders in the Textile and Clothing Industries

THE VOLUME of orders on hand in the textile and clothing industries considered as a group fell in July to 4 per cent. less than at the end of June. Deliveries in July were 9 per cent. less than in July, 1961. The rate of receipt of net new orders was 2 per cent. more.

There are marked seasonal fluctuations in demand in the textile and clothing industries, and sharp month to month changes in the rate at which orders are received should not, by themselves, be taken to imply similar sharp changes in production; they may, for example, lead to changes in the length of orders books or the level of stocks.

Textile and Clothing Industries (a)
Index Numbers of the Volume of Total Orders and Deliveries (b)

	Orders-on-hand (end of period)	Net new orders (c)	Deliveries (c)
	April 1959 = 100	Average 1959 deliveries = 100	Averages 1959 deliveries = 100
1960	136	103	103
1961*	104	91	99
1961 1st quarter	128	95	103
2nd quarter	123	94	99
3rd quarter	106	77	94
4th quarter*	104	98	99
1962 1st quarter*	99	91	97
2nd quarter*	99	90	91
1961 May	126	89	94
June	124	94	102
July	117	74	94
1962 May*	100	99	92
June*	99	87	91
July*	95	75	85

(a) Wool, hosiery (and other knitted goods), made-up clothing and the spinning, weaving and merchant converting section of the cotton and man-made fibre industries.
(b) At constant (average 1958) prices
(c) These indices have been adjusted to allow for differences in the lengths of calendar months but not for holidays or for other seasonal variations.
* Provisional.

United Kingdom Direct Investment Overseas 1958 to 1961

DIRECT investment overseas, excluding oil and insurance, by British companies during 1961 was £218 million, some 12 per cent. less than the £247 million invested in 1960 but higher than in 1959 or 1958. Unremitted profits, a significant component of total investment, fell in value to £74 million in 1961, compared with £85 million in 1960 and £93 million in 1959. As a proportion of total investment unremitted profits in 1961 were about the same as in 1960 (34 per cent.) but less than in either 1958 or 1959.

Overseas companies invested £233 million in their United Kingdom branches, subsidiaries and associates during 1961, compared with £135 million in 1960 and £146 million in 1959, but included is the £129 million acquisition of the remaining issued capital of British Ford Motor Company by its American parent. No clear trend in this series is discernible because in each of the years 1959 to 1961 there have been large individual transactions involving North American companies. Here again the unremitted profit element fell from £76 million in 1959 and £67 million in 1960 to £40 million in 1961.

Table 1 (a)

Private Direct Investment, 1958 to 1961

(Excluding Oil and Insurance)*

£ million

	Overseas branches, subsidiaries and associates of United Kingdom companies				Branches, subsidiaries and associates of overseas companies operating in United Kingdom			
	1958	1959	1960	1961	1958	1959	1960	1961
Unremitted profits of subsidiaries	— 74	— 93	— 85	— 74	+44	+ 76	+ 67	+ 40
Net acquisition of share and loan capital	— 41	— 52	— 80	— 83	+21	+ 55	+ 35	+167
Change in branch indebtedness	— 16	— 34	— 30	— 27	+11	— 2	+ 3	+ 11
Change in inter-company accounts	— 13	— 16	— 52	— 35	+11	+ 17	+ 30	+ 15
Total	—144	—196	—247	—218	+87	+146	+135	+233

Overseas investment in United Kingdom + United Kingdom overseas investment—

Earnings

Earnings in 1961 by British companies from direct investment abroad (Table 1 (b)) were slightly lower than in 1960 owing to a fall of 4 per cent. in the profits earned by subsidiaries; branch profits were unchanged. Total earnings were nevertheless nearly 6 per cent. more than in 1959.

No information is available to show the amount of branch profits actually remitted but in the case of the United Kingdom these are known to be considerable. The following table sets out the position for overseas subsidiaries.

Earnings of U.K. Companies' Subsidiaries Operating Overseas

£ million

	1958	1959	1960	1961
Earnings of overseas subsidiaries	124	149	157	151
Dividends remitted . Value	50	56	72	77
As per cent. of total earnings	40	38	46	51
Unremitted earnings of overseas subsidiaries	74	93	85	74

In each of the years since 1958, when this survey started, the remitted earnings of British subsidiaries overseas have increased in value. Except for 1959 when the percentage of total earnings remitted dropped slightly to 38 per cent., the percentage repatriated has increased from 40 per cent. to 51 per cent.

Overseas companies operating in the United Kingdom fared slightly less well, and their earnings from branches and subsidiaries in 1961 were 4 per cent. less than in 1960 which itself showed an increase on 1959.

Overseas enterprises operating in the United Kingdom are organized in the main as subsidiaries rather than branches. Less than 10 per cent. of total profits are earned by branches in the United Kingdom of overseas companies, compared with more than one-third of total profits which branches of United Kingdom companies earned abroad.

Earnings of Overseas Enterprises Operating in the United Kingdom

£ million

	1958	1959	1960	1961
Earnings of subsidiaries in the United Kingdom	85	125	125	122
Dividends remitted – Value	41	49	58	82
As per cent. of total earnings	48	39	46	67
Unremitted earnings of subsidiaries in the United Kingdom	44	76	67	40

Of the earnings of overseas subsidiaries, which in 1961 were very slightly below those of 1960, a considerably higher proportion and amount were remitted. Out of subsidiary profits of £122 million in 1961 £82 million (67 per cent.) was remitted compared with £58 million (46 per cent.) out of total subsidiary earnings of £125 million in 1960.

Coverage of the Estimates

The figures given in Table I are based on annual returns and replace those shown in the *Board of Trade Journal* of March 30, 1962, and Tables 9 and 12 of the March 1962 White Paper on United Kingdom Balance of Payments (Cmnd. 1671) which were based on incomplete quarterly data provided by a sample of firms.

Allowance has been made in the summary Tables 1(a) and 1(b) for non-response in the years 1959 to 1961 and to this extent the totals of Tables 2 and 3, being an analysis of returns actually received, do not correspond with Table 1.

The figures for 1958 are substantially complete and those for 1959 and 1960 represent a 95 per cent. response. The 1961 estimates for overseas interests in the United Kingdom are based on a response of about 90 per cent., and those for United Kingdom companies' investment overseas on a response rate of about 75 per cent. To draw attention to the incompleteness of the 1961 detail in Tables 2 and 3 the figures are shown in italics.

Area and Country Analysis

Figures in Table 3(a) show that the Sterling Area's share of total overseas direct investment by United Kingdom companies in 1961 was 56 per cent. of the total compared with 63 per cent. in 1960 and 53 per cent. in 1959. There is, however, some indication that 1960 was exceptional. This was almost wholly attributable to the

(*Continued on next page*)

Table 1 (b)

Earnings of Private Direct Investment, 1958 to 1961

(Excluding Oil and Insurance)*

£ million

	Overseas branches, subsidiaries and associates of United Kingdom companies				Branches, subsidiaries and associates of overseas companies operating in United Kingdom			
	1958	1959	1960	1961	1958	1959	1960	1961
Profits of branches	+ 67	+ 85	+ 96	+ 95	— 8	— 10	— 11	— 8
Profits of subsidiaries	+124	+149	+157	+151	— 85	—125	—125	—122
Interest received or paid	+ 4	+ 4	+ 5	+ 6	— 1	— 1	— 2	— 2
Total	+195	+238	+258	+252	— 95	—136	—137	—131

United Kingdom credits + United Kingdom debits—

* 1959, 1960 and 1961 figures include an allowance for non-response; 1958 figures are substantially complete.

U.K. Direct Investment Overseas (*Continued*)

high level of investment in Australia during 1960, when it took 24 per cent. of the United Kingdom's total direct investment abroad. In 1958 and 1959 Australia's share was about 14 per cent. and in 1961 16 per cent. The proportion of total investment in the Sterling Area accounted for by undistributed profits has fallen over the years from 47 per cent. in 1958 to 32 per cent. in 1960 and 28 per cent. in 1961. Investment in South Africa in 1961 was very small at about a quarter of the amount invested in 1960.

In 1960 direct investment by United Kingdom industry in North America accounted for 18 per cent. of the total. Although returns are incomplete it appears that there was in 1961 a falling off in the Canadian share of United Kingdom investment abroad. In contrast, United Kingdom direct investment in Western Europe rose substantially and in 1961 represented 20 per cent. of the total compared with about 10 per cent. in 1959 and 1960. Of this about 14 per cent. went into E.E.C. countries as against 9 per cent. in

Overseas Direct Investment Transactions By Area

(This table is based on returns actually received and unlike Table 1 does not include an allowance for non-response. To this extent the totals will not agree with those in Table 1.)

Table 2 (a) Transactions of United Kingdom Companies with Overseas Branches*

£ million

Area		Profits of branches	Net amount debited to branches for services rendered	Investment or disinvestment in branches		Depreciation of capital assets of branches
				Increase in investment	Decrease in investment	
North America	1958	3·0	3·0	—	4·9	0·4
	1959	3·5	0·8	1·2	—	0·4
	1960	3·2	—0·6	4·9	—	0·5
	1961	*4·9*	*0*	*10·4*	—	*0·3*
Latin America	1958	2·1	1·0	—	2·9	1·0
	1959	3·0	1·0	1·4	—	0·6
	1960	3·3	0·9	3·5	—	0·8
	1961	*2·0*	*0·9*	*1·6*	—	*0·5*
Western Europe¶	1958	2·0	0·6	1·9	—	1·0
	1959	5·2	0·4	1·9	—	1·2
	1960	6·6	0·1	2·3	—	1·4
	1961	*2·9*	*0·1*	*1·2*	—	*1·1*
Other Non-Sterling Areas¶	1958	2·0	0·5	1·9	—	1·1
	1959	1·6	0·8	0	—	1·1
	1960	0·9	0·4	0·1	—	0·8
	1961	*2·2*	*0·6*	*3·2*	—	*0·4*
Rest of Sterling Area	1958	57·5	12·6	19·6	—	18·6
	1959	65·0	11·3	30·3	—	18·1
	1960	77·6	12·7	20·4	—	19·3
	1961	*51·6*	*11·6*	*6·6*	—	*13·4*
Total	1958	66·6	17·7	15·7	—	22·2
	1959	78·2	14·3	34·8	—	21·3
	1960	91·5	13·4	31·2	—	22·7
	1961‖	*63·7*	*13·2*	*22·9*	—	*15·7*

Table 2 (b) Transactions of United Kingdom Companies with Overseas Subsidiaries and Associates*

£ million

Area		U.K. companies' share of overseas companies' profits	Interest received	Dividends received	Unremitted profits§	Net amount debited to overseas companies for services rendered	Net acquisition of overseas companies' share and loan capital	U.K. companies' share of depreciation of capital assets of overseas companies	Change in amount due to U.K. companies on inter-company account†
North America	1958	35·0	0·5	11·3	23·7	0·7	10·8	30·2	+ 8·4
	1959	36·6	0·5	12·6	23·9	0·2	12·5	32·2	+13·8
	1960	32·2	0·9	14·8	17·4	—0·2	15·4	36·1	+ 5·1
	1961	*25·4*	*0·5*	*12·7*	*12·7*	*—0·1*	*4·8*	*24·8*	*— 4·4*
Latin America	1958	8·4	0·2	2·4	6·0	0·6	1·8	3·6	+ 0·3
	1959	8·3	0·1	2·5	5·8	0·2	5·0	2·3	— 0·5
	1960	11·2	0·1	3·4	7·7	0·4	1·4	2·9	+ 2·0
	1961	*7·4*	*0·2*	*2·4*	*5·1*	*0·6*	*5·8*	*2·7*	*+ 4·1*
Western Europe¶	1958	12·4	0·6	5·5	6·9	1·9	3·9	10·2	+ 1·1
	1959	17·5	0·6	5·9	11·6	1·1	6·1	10·2	+ 0·3
	1960	14·4	0·7	8·3	6·1	0·5	12·2	11·8	+ 4·2
	1961	*17·9*	*0·4*	*7·6*	*10·3*	*1·3*	*11·8*	*12·1*	*+10·0*
Other Non-Sterling Areas¶	1958	3·8	0·7	3·2	0·6	1·0	7·0	2·8	— 1·8
	1959	7·2	0·6	3·1	4·1	1·0	1·3	2·5	+ 0·1
	1960	5·8	0·6	4·0	1·8	1·1	2·6	2·2	+ 1·6
	1961	*1·2*	*0·2*	*0·4*	*0·8*	*—0·1*	*0·8*	*0·8*	*— 3·3*
Rest of Sterling Area	1958	64·3	2·4	27·5	36·9	5·1	17·3	37·3	+ 5·0
	1959	73·5	2·2	29·3	44·2	7·4	22·9	38·2	+ 2·6
	1960	87·9	2·6	38·9	49·0	6·4	44·9	42·0	+36·6
	1961	*65·3*	*3·2*	*39·0*	*26·3*	*7·3*	*38·0*	*36·5*	*+22·8*
Total	1958	124·0	4·3	49·9	74·1	9·3	40·8	84·2	+13·0
	1959	143·1	3·9	53·5	89·7	9·9	47·8	85·4	+16·3
	1960	151·5	4·9	69·4	82·1	8·1	76·5	95·0	+49·6
	1961‖	*117·3*	*4·5*	*62·1*	*55·2*	*8·9*	*61·1*	*76·8*	*+29·1*

U.K. Direct Investment Overseas (*Continued*)

1960, with France and Western Germany taking about three-quarters in 1961 and a half in 1960. The amount invested in EFTA in 1961 was more than double that invested in 1960, largely owing to a significant increase in the amount invested in Switzerland.

Companies in the United States continued to be the largest investors in the United Kingdom and in 1961 their direct investments formed 82 per cent. of the total (including the Ford Motor Company transaction) compared with 64 per cent. in 1960 and 71 per cent. in 1959. There was also exceptionally a big increase in the amount invested in this country in 1961 by enterprises in E.E.C. countries when it was about four times higher than in 1960.

The earnings of United Kingdom investments in the Sterling

Table 2 (c) Transactions of United Kingdom Branches with Overseas Parent Companies*

£ million

Area		Profits of branches	Net amount charged for services rendered		Investment or disinvestment in branches		Depreciation of capital assets of branches
			Credited to U.K. branches	Debited to U.K. branches	Increase in investment	Decrease in investment	
North America	1958	4·6	—	0·3	3·4	—	0·3
	1959	6·5	—	0·9	3·4	—	0·4
	1960	6·5	—	0·8	1·2	—	0·4
	1961	*5·3*	—	*0·7*	—	*0*	*0·5*
Latin America	1958	0	—	—	—	—	—
	1959	0	—	—	—	—	—
	1960	—	—	—	—	—	—
	1961	..	..	..	..	..	..
Western Europe¶	1958	1·0	0·1	—	2·7	—	0·1
	1959	0·9	—	0·2	—	5·6	0·1
	1960	1·1	—	0·1	—	4·2	0
	1961	*1·4*	—	*0·1*	*10·8*	—	*0*
Other Non-Sterling Areas¶	1958	0·4	0·1	—	—	0·2	0
	1959	0·3	0·1	—	—	0·3	0
	1960	0·3	0·1	—	0·1	—	0
	1961	..	..	..	..	..	..
Rest of Sterling Area	1958	2·0	—	0	4·8	—	0·1
	1959	1·9	—	0·1	—	0	0·2
	1960	1·7	—	0·2	5·1	—	0·4
	1961	..	..	..	..	..	..
Rest of World (Latin America, Other Non-Sterling Area and Sterling Area)	*1961*	*0·3*	—	*0·1*	*0*	—	*0·1*
Total	1958	7·9	—	0·2	10·7	—	0·5
	1959	9·6	—	1·1	—	2·5	0·7
	1960	9·7	—	1·0	2·2	—	0·8
	1961‖	*6·9*	—	*0·9*	*10·8*	—	*0·6*

Table 2 (d) Transactions of U.K. Subsidiaries and Associates with Overseas Parent or Affiliated Companies*

£ million

Area		Overseas companies' share of U.K. companies' profits	Interest paid to overseas companies	Dividends paid to overseas companies	Unremitted profits§	Net amount charged for services rendered		Net acquisition of U.K. companies' share and loan capital	Overseas companies' share of depreciation of capital assets of U.K. companies	Change in amount due from U.K. companies on inter-company account‡
						Credited to U.K. companies	Debited to U.K. companies			
North America	1958	71·9	0·4	35·3	36·6	—	9·8	17·4	33·6	+14·2
	1959	99·0	0·4	42·6	56·5	—	12·7	44·1	37·4	+ 8·7
	1960	105·5	0·3	50·6	54·9	—	17·3	17·8	43·2	+28·1
	1961	*94·7*	*0·4*	*64·0*	*30·7*	—	*19·5*	*145·9*	*51·6*	*+ 9·4*
Latin America	1958	0·2	—	0	0·2	—	0	—	0·1	— 0·6
	1959	0	0	—	0	—	0	0	0·1	+ 0
	1960	0·1	0	0	0·1	—	0	0	0·1	+ 0
	1961	..	..	..	..	..	..	..	..	..
Western Europe¶	1958	12·5	0·8	4·9	7·5	—	4·9	2·7	7·5	— 6·8
	1959	16·2	0·7	4·5	11·7	—	5·9	3·6	7·7	+ 7·5
	1960	13·8	1·8	4·9	9·0	—	4·9	9·0	9·4	+ 2·0
	1961	*10·8*	*1·0*	*11·0*	*—0·2*	—	*5·3*	*10·1*	*6·7*	*+ 0·8*
Other Non-Sterling Areas¶	1958	0·5	—	0·4	0·1	0·1	—	—	0·1	— 0
	1959	0·5	—	0·3	0·2	0·1	—	0	0·1	— 0
	1960	0·7	—	0·3	0·4	0·1	—	0·7	0·1	— 0·1
	1961	..	..	..	..	..	..	..	..	..
Rest of Sterling Area	1958	0·3	0·2	0·1	0·2	0·1	—	0·8	0·2	+ 4·3
	1959	0·3	0·2	0·3	0	0·3	—	6·2	0·2	+ 0·5
	1960	0·8	0·2	0·4	0·4	—	0·3	7·7	0·3	— 0·1
	1961	..	..	..	..	..	..	..	..	..
Rest of World (Latin America, Other Non-Sterling Area, Sterling Area)	*1961*	*1·9*	*0·3*	*0·8*	*1·1*	—	*0·5*	*2·2*	*0·4*	*+ 0·8*
Total	1958	85·3	1·3	40·8	44·5	—	14·5	20·9	41·5	+11·0
	1959	116·1	1·2	47·6	68·5	—	18·3	54·0	45·5	+16·7
	1960	120·9	2·3	56·2	64·7	—	22·4	35·1	53·0	+30·0
	1961‖	*107·4*	*1·6*	*75·9*	*31·5*	—	*25·3*	*158·2*	*58·6*	*+11·0*

* Excluding oil and insurance. † Increase in amount due to U.K. +; Decrease in amount due to U.K. —. ‡ Increase in amount due from U.K. +; Decrease in amount due from U.K. —. § Share of profits less dividends. ¶Dependencies of Western European countries are included in 'Other non-Sterling areas.' In the Tables '0' means less than half the final digit shown. .. Figures not available owing to disclosure. Owing to rounding figures may not add through to the total. Coverage incomplete — see footnotes to Table 3.

(*Continued on next page*)

U.K. Direct Investment Overseas (*Continued*)

Area (Table 3(b)) fell back slightly in 1961 when they were 65 per cent. of the total compared with 68 per cent. in 1960. South Africa became the largest contributor followed closely by Australia. On the other hand, the figures indicate there was some increase in the earnings from United Kingdom investments in North America and Western Europe in 1961 compared with 1960. American interests again accounted for more than three-quarters of the total earnings of overseas enterprises in the United Kingdom.

(An article defining the scope and purpose of the Overseas Investment Inquiry was published in the *Board of Trade Journal* on October 7, 1960.)

Investment and Earnings by Area and Country

(This table is based on returns actually received and unlike Table 1 does not include an allowance for non-response. To this extent the totals will not agree with those in Table 1)

Table 3 (a)

Private Direct Investment (Excluding Oil and Insurance) by Area and Main Countries*

£ million

Area and Country	1958		1959		1960		*1961*	
	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals
NORTH AMERICA	— 38·1	+71·6	— 51·4	+112·7	— 42·8	+102·0	*— 23·5*	*+186·0*
U.S.A.	— 10·6	+62·1	— 15·5	+ 97·2	— 15·3	+ 84·3	*— 10·7*	*+172·5*
Canada	— 27·5	+ 9·5	— 35·9	+ 15·5	— 27·5	+ 17·7	*— 12·8*	*+ 13·4*
LATIN AMERICA	— 5·2	— 0·5	— 11·7	+ 0·1	— 14·6	+ 0·2	*— 16·5*	..
of which: Peru	— 0·2	—	+ 1·3	—	— 0·4	—	*+ 0·1*	—
Chile	— 0·3	—	— 0·6	—	— 0·6	—	*— 1·9*	—
Brazil	— 4·3	—	— 5·3	..	— 4·0	..	*— 4·5*	..
Uruguay	+ 0·3	..	— 0	..	..	..	*— 0·1*	..
Argentine	— 0·8	— 0·5	— 3·1	—	— 4·0	..	*— 7·6*	..
WESTERN EUROPE	— 13·8	+ 6·1	— 19·9	+ 17·3	— 24·8	+ 15·8	*— 33·3*	*+ 21·4*
EFTA of which:	— 2·9	+ 4·4	— 0·7	+ 8·3	— 3·4	+ 11·5	*— 8·1*	*+ 6·6*
Portugal	— 1·3	..	— 0·2	..	+ 0·1	..	*— 0·5*	..
Switzerland	— 0·6	+ 3·0	— 0·1	+ 5·9	— 1·1	+ 9·2	*— 3·8*	*+ 7·1*
Denmark	— 0·4	+ 0·3	— 0·3	+ 0·4	— 0·7	+ 0·3	*— 0·9*	*+ 0·7*
E.E.C. of which:	— 8·4	+ 1·2	— 16·2	+ 8·8	— 20·9	+ 3·5	*— 23·8*	*+ 13·0*
West Germany	— 6·7	+ 0·1	— 6·7	+ 0·9	— 5·2	+ 1·2	*— 8·8*	*+ 0·4*
Netherlands	— 0·3	— 2·0	+ 0·1	+ 5·2	— 2·1	+ 2·0	*— 2·8*	*+ 1·0*
Belgium	— 1·5	+ 0·6	— 3·4	+ 0·7	— 4·6	+ 0·9	*— 1·4*	*+ 0·6*
France	+ 0·4	+ 2·9	— 4·5	+ 1·0	— 5·1	— 1·1	*— 7·9*	*+ 11·2*
Italy	— 0·1	..	— 1·8	+ 0·9	— 4·8	+ 0·5	*— 2·9*	*— 0·3*
Rest of Western Europe	— 2·5	+ 0·5	— 3·1	+ 0·2	— 0·5	+ 0·8	*— 1·4*	*+ 1·9*
OTHER NON-STERLING AREAS	— 7·7	— 0·1	— 5·6	— 0·1	— 6·2	+ 1·1	*— 1·5*	..
of which: Iraq	+ 0·4	—	+ 0·2	—	+ 1·2	..	*— 0·5*	—
Iran	— 0·7	—	— 0·2	—	— 0·4	—	*— 0·4*	—
Indonesia	— 2·1	—	— 1·3	..	— 2·2	..	*— 0·8*	..
Thailand	— 0·5	—	+ 0·1	..	— 0·3	—	*— 0·4*	—
REST OF STERLING AREA	— 78·8	+10·1	—100·1	+ 6·7	—150·8	+ 13·1	*— 93·8*	*+ 4·3*
of which: South Africa	— 19·9	..	— 10·2	+ 3·4	— 17·6	+ 5·5	*— 3·9*	*+ 0·4*
India	— 5·9	..	— 12·4	0	— 13·5	..	*— 8·5*	..
Australia and Dependencies	— 19·4	— 0·2	— 27·3	0	— 57·0	— 0·4	*— 27·7*	*+ 0·7*
New Zealand	— 4·0	..	— 4·2	..	— 6·0	..	*— 5·2*	..
Federation of Rhodesia and Nyasaland	+ 0·5	..	— 13·5	..	— 12·8	..	*— 14·1*	..
Pakistan	— 0·4	—	— 2·4	..	— 1·8	..	*— 1·5*	..
Singapore	— 1·5	..	— 1·2	— 0·1	— 0·6	..	*+ 0·1*	..
Federation of Malaya	— 5·5	..	— 5·7	..	— 8·4	..	*— 6·0*	—
Nigeria	— 4·0	..	— 3·9	..	— 6·9	..	*— 8·9*	..
Sierra Leone	— 1·3	—	..	—	— 1·1	—	*— 2·1*	—
Ghana	+ 0·1	—	— 2·8	—	— 4·1	—	*— 1·2*	—
Kenya	— 2·7	—	— 1·2	—	— 2·6	—	*— 1·2*	—
Uganda	+ 0·8	—	+ 0·1	—	— 0	—	*— 0·3*	—
Hong Kong	— 1·8	—	— 0·8	..	— 0·4	..	*— 0·7*	..
Jamaica	— 1·6	—	— 2·3	..	— 4·7	..	*— 1·4*	..
Trinidad	— 2·2	—	— 1·6	—	— 2·6	..	*— 0·3*	—
British Guiana	+ 0·1	—	— 0·1	—	+ 0·7	—	..	—
Other British West Indian Territories	— 3·5	..	— 0·4	..	— 2·6	..	*— 5·4*	..
Persian Gulf States	+ 0·1	—	— 1·0	—	+ 0	—	*0*	—
Irish Republic	— 2·8	..	— 0·9	+ 0·1	— 4·7	— 0·1	*— 4·4*	..
Remainder	— 4·9	—	— 8·3	..	— 4·4	..	*— 1·4*	..
Total	—143·5	+87·3	—188·6	+136·6	—239·4	+132·1	*—168·4*†	*+211·5*‡

* Includes long- and short-term investment and unremitted profits. + Overseas investment in the United Kingdom; — United Kingdom investment overseas. '0' less than half final digit. .. Figures not available owing to disclosure. † Incomplete — representing 75 per cent. response. ‡ Incomplete — representing 90 per cent. response.

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U.K. Direct Investment Overseas (*Continued*)

Table 3 (b)

Earnings of Private Direct Investment (Excluding Oil and Insurance) by Area and Main Countries*

£ million

Area and Country	1958		1959		1960		*1961*	
	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals	Overseas branches, subsidiaries and associates of U.K. companies	Branches, subsidiaries and associates in U.K. with overseas principals
NORTH AMERICA	+ 38·5	—76·9	+ 40·7	—105·9	+ 36·2	—112·3	*+ 30·8*	*—100·4*
U.S.A.	+ 17·1	—70·6	+ 19·9	— 96·6	+ 18·1	—102·0	*+ 15·9*	*— 90·2*
Canada	+ 21·4	— 6·3	+ 20·7	— 9·2	+ 18·2	— 10·3	*+ 14·9*	*— 10·1*
LATIN AMERICA	+ 10·7	— 0·2	+ 11·4	0	+ 14·5	— 0·1	*+ 9·7*	..
of which: Peru	+ 0·3	—	+ 0·4	—	+ 0·4	—	*+ 0·2*	—
Chile	+ 0·4	—	+ 0·8	—	+ 0·5	—	*+ 0·5*	—
Brazil	+ 4·7	—	+ 3·3	..	+ 5·0	—	*+ 3·8*	—
Uruguay	— 0·2	..	+ 0·1	..	+ 0·2	..	*+ 0·1*	—
Argentine	+ 2·2	— 0·2	+ 3·0	—	+ 4·1	..	*+ 2·4*	..
WESTERN EUROPE	+ 15·0	—14·2	+ 23·3	— 17·8	+ 21·7	— 16·7	*+ 21·2*	*— 13·1*
EFTA of which:	+ 3·2	— 4·7	+ 4·4	— 7·0	+ 5·1	— 8·7	*+ 4·0*	*— 5·7*
Portugal	+ 1·8	..	+ 2·0	..	+ 2·1	..	*+ 1·9*	..
Switzerland	+ 0·5	— 3·2	+ 0·6	— 5·0	+ 1·0	— 6·6	*+ 1·0*	*— 4·2*
Denmark	+ 0·4	— 0·2	+ 0·5	— 0·2	+ 0·4	— 0·5	*+ 0·3*	*— 0·6*
E.E.C. of which:	+ 10·3	— 8·7	+ 17·2	— 10·0	+ 14·8	— 6·5	*+ 15·3*	*— 6·1*
West Germany	+ 7·7	— 0·3	+ 9·8	— 0·2	+ 10·1	— 0·3	*+ 10·2*	*— 0·1*
Netherlands	+ 0·8	— 5·0	+ 1·4	— 5·7	+ 1·6	— 2·9	*+ 1·7*	*— 2·7*
Belgium	+ 0·7	— 0·7	+ 1·6	— 0·6	+ 0·7	— 0·6	*+ 0·6*	*— 0·7*
France	+ 0·8	— 2·8	+ 3·7	— 3·3	+ 2·2	— 2·6	*+ 2·0*	*— 2·7*
Italy	+ 0·2	..	+ 0·7	— 0·2	+ 0·2	— 0	*+ 0·8*	*+ 0·1*
Rest of Western Europe	+ 1·4	— 0·8	+ 1·6	— 0·8	+ 1·8	— 1·5	*+ 1·8*	*— 1·3*
OTHER NON-STERLING AREAS	+ 6·5	— 0·8	+ 9·3	— 0·7	+ 7·3	— 1·0	*+ 3·6*	..
of which: Iraq	+ 0·3	—	— 0·4	—	— 0·9	—	*+ 0·7*	—
Iran	+ 0·5	—	+ 0·3	—	0	—	*+ 0·1*	—
Indonesia	+ 1·7	—	+ 1·8	..	+ 1·9	..	*+ 0·9*	..
Thailand	+ 0·3	—	+ 0·5	..	+ 0·3	..	*+ 0·2*	—
REST OF STERLING AREA	+124·3	— 2·4	+140·7	— 2·4	+168·0	— 2·7	*+120·1*	*— 1·3*
of which: South Africa	+ 21·2	..	+ 21·1	— 0·6	+ 26·3	+ 0·3	*+ 20·7*	*+ 2·5*
India	+ 15·9	..	+ 17·1	+ 0	+ 19·3	..	*+ 13·1*	..
Australia and Dependencies	+ 24·3	— 0·5	+ 28·6	— 0·3	+ 30·7	— 0·5	*+ 20·4*	*— 0·7*
New Zealand	+ 5·3	..	+ 4·2	..	+ 7·4	—	*+ 4·1*	—
Federation of Rhodesia and Nyasaland	+ 7·8	..	+ 9·3	..	+ 11·9	..	*+ 10·1*	..
Pakistan	+ 2·2	—	+ 2·8	..	+ 2·4	..	*+ 2·1*	..
Singapore	+ 0·8	..	+ 1·2	— 0·1	+ 1·4	..	*+ 0·7*	..
Federation of Malaya	+ 10·5	..	+ 15·2	..	+ 18·6	—	*+ 12·2*	—
Nigeria	+ 3·6	..	+ 4·9	..	+ 6·4	..	*+ 2·8*	..
Sierra Leone	+ 1·9	—	..	..	+ 2·4	—	*+ 3·2*	—
Ghana	+ 5·8	—	+ 6·6	—	+ 7·3	—	*+ 6·6*	—
Kenya	+ 0·8	—	+ 1·4	—	+ 1·3	—	*+ 0·8*	—
Uganda	+ 0·1	—	+ 0·1	—	+ 0·1	—	*+ 0·3*	—
Hong Kong	+ 2·1	—	+ 3·1	..	+ 3·9	..	*+ 2·1*	..
Jamaica	+ 0·7	—	+ 0·5	..	+ 1·0	..	*+ 1·2*	..
Trinidad	+ 1·5	—	+ 1·8	—	+ 1·1	..	*+ 1·3*	—
British Guiana	+ 1·3	—	+ 1·3	—	+ 1·2	—	*+ 0·6*	—
Other British West Indian Territories	+ 0·6	..	+ 0·5	..	+ 0·7	..	*+ 0·5*	..
Persian Gulf States	+ 0·7	—	+ 0·7	—	+ 0·7	—	*+ 0·4*	—
Irish Republic	+ 5·9	..	+ 6·6	— 0·3	+ 6·9	+ 0·3	*+ 8·0*	..
Remainder	+ 11·2	—	+ 13·7	..	+ 17·0	..	*+ 8·8*	..
Total	+194·9	—94·6	+225·3	—126·8	+247·9	—132·9	*+185·4*†	*—116·0*‡

* Including unremitted profits. — United Kingdom debit. + United Kingdom credit. .. Figures not available owing to disclosure. '0' Less than half final digit.
† Incomplete – representing 75 per cent. response. ‡ Incomplete – representing 90 per cent. response.

Report on Overseas Trade

Prepared by the Statistics Division of the Board of Trade

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Capital Expenditure in the Second Quarter of 1962

PROVISIONAL estimates for the second quarter of 1962 show that the volume of capital expenditure by the manufacturing, distributive and service industries, seasonally adjusted at 1958 prices, was about 3½ per cent. higher than in the previous quarter. As may be seen from the figures in Table 1, this rise in expenditure was due to higher expenditure by the distributive and service industries, slightly offset by a continued decline in manufacturing expenditure.

Table 1. Industry's Fixed Capital Expenditure at 1958 Prices Seasonally Adjusted (a)

£ million

	Manufacturing Industry (b)	Distributive and Service Industries (c)	Total
1957	961	653	1,614
1958	922	699	1,621
1959	867	795	1,662
1960	1,024	879	1,903
1961	1,229	849	2,078
1957 1st quarter	248	161	409
2nd quarter	246	156	402
3rd quarter	234	174	408
4th quarter	233	162	395
1958 1st quarter	233	181	414
2nd quarter	233	165	398
3rd quarter	232	177	409
4th quarter	224	176	400
1959 1st quarter	213	173	386
2nd quarter	214	206	420
3rd quarter	215	198	413
4th quarter	225	218	443
1960 1st quarter	239	216	455
2nd quarter	245	223	468
3rd quarter	272	219	491
4th quarter	268	221	489
1961 1st quarter	290	213	503
2nd quarter	311	212	524
3rd quarter	329	225	554
4th quarter	299	199	498
1962 1st quarter	293	189	482
2nd quarter	289	210	499

The total of manufacturing industry and of the distributive and service industries covers a wide sector of the economy, accounting – after exclusion of dwellings – for 56 per cent. of total capital expenditure in 1960. The total comprises most industries and services outside agriculture, forestry and fishing, coal mining, public utilities, the public transport corporations and public administration. The excluded parts are, except for agriculture, very largely in the public sector of the economy and though some public expenditure is included, it is small; the figures are therefore very largely representative of the trend of expenditure by private industry and business.

For other footnotes, see end of article.

Manufacturing Industry

The total expenditure of manufacturing industry in the second quarter of 1962 is provisionally estimated to have amounted to some £297 million, at current prices, or some 5 per cent. less than in the same quarter of 1961, with expenditure on building work up 1 per cent. and on plant and machinery down 7 per cent. The volume of fixed capital expenditure by manufacturing industry (at 1958 prices, not seasonally adjusted) was £280 million, or some 7 per cent. lower than in the second quarter of last year. The total seasonally adjusted volume figure (at 1958 prices) amounted to £289 million or 1½ per cent. less than in the first quarter of this year – following declines from the level of the previous quarter of 9 per cent. and 2 per cent. respectively, in the fourth quarter of 1961 and the first quarter of 1962.

Fuller details about capital expenditure in the second quarter of 1962, at current prices, by individual groups of manufacturing industries, will as usual not be published until the final second quarter article due to appear in the *Board of Trade Journal* of October 12, 1962. The provisional figures suggest, however, that most of the decline in expenditure in the second quarter, in relation to the same quarter of 1961, occurred in the metal manufacturing (primarily the iron and steel) and the engineering groups of industries.

Distributive and Service Industries

The total expenditure in the second quarter of 1962 of the distributive and service industries is provisionally estimated to have been £210 million, at 1958 prices, seasonally adjusted, or 11 per cent. higher than in the first quarter of 1962. This increase in the second quarter follows two reductions of 12 per cent. and 5 per cent. in the fourth quarter of 1961 and the first quarter of 1962 respectively.

The figure at current prices was also £210 million and was just over 2 per cent. higher than in the second quarter of 1961. Further details of this expenditure, by individual industry groups, will be published in the final second quarter article.

Table 2. Fixed Capital Expenditure at Average 1958 Prices, Not Seasonally Adjusted, Showing Percentage Changes Compared with Corresponding Periods a Year Earlier (a)

	Manufacturing Industry (b)								Distributive and Service Industries (c)							
	Building work		Vehicles		Plant and machinery		Total		Building work		Vehicles		Plant and machinery		Total	
	£ million	% Change	£ million	% Change	£ million	% Change	£ million	% Change	£ million	% Change	£ million	% Change	£ million	% Change	£ million	% Change
1957	272·6	N/C	45·4	— 8	643·0	+ 6	961·0	+ 4	192	+ 3	306	+ 7	155	+15	653	+ 7
1958	246·9	— 9	52·4	+15	622·6	— 3	921·9	— 4	202	+ 5	326	+ 6	171	+10	699	+ 7
1959	223·1	—10	56·9	+ 9	586·5	— 6	866·5	— 6	234	+16	364	+12	197	+15	795	+14
1960	271·7	+22	75·3	+32	676·8	+15	1,023·8	+18	267	+14	401	+10	211	+ 7	897	+11
1961	350·8	+29	75·9	+ 1	802·0	+18	1,228·7	+20	267	N/C	369	— 8	213	+ 1	849	— 4
1958 1st quarter	56·0	—18	13·1	+54	152·4	— 4	221·5	— 6	52	N/C	84	+16	46	+20	182	+12
2nd quarter	63·6	— 2	13·9	+21	149·4	— 8	226·9	— 5	46	+ 2	77	+ 5	38	+19	161	+ 5
3rd quarter	60·7	— 9	12·9	+ 9	156·2	+ 2	229·8	— 1	50	+ 7	76	— 3	39	+ 2	165	+ 1
4th quarter	66·6	— 8	12·5	— 8	164·6	— 2	243·7	— 4	54	+16	89	+ 8	48	+ 3	191	+ 9
1959 1st quarter	49·0	—12	13·6	+ 4	139·0	— 9	201·6	— 9	55	+ 5	75	—11	45	— 2	175	— 4
2nd quarter	51·0	—20	15·2	+ 9	142·1	— 5	208·3	— 8	57	+24	97	+25	48	+27	202	+25
3rd quarter	52·9	—13	13·0	+ 1	146·6	— 6	212·5	— 8	55	+12	81	+ 8	47	+22	183	+12
4th quarter	70·2	+ 5	15·1	+21	158·8	— 4	244·1	N/C	67	+23	111	+25	57	+20	235	+23
1960 1st quarter	58·3	+19	17·0	+25	150·7	+ 8	226·0	+12	69	+25	98	+31	52	+16	219	+25
2nd quarter	61·8	+21	20·2	+33	156·2	+10	238·2	+14	66	+16	102	+ 6	49	+ 3	217	+ 8
3rd quarter	72·9	+38	18·3	+41	178·1	+21	269·3	+27	61	+10	91	+12	52	+ 9	204	+11
4th quarter	78·7	+12	19·8	+31	191·8	+21	290·3	+19	71	+ 7	110	— 1	58	+ 2	239	+ 2
1961 1st quarter	72·8	+25	19·6	+15	182·4	+21	274·8	+22	62	—10	99	+ 1	54	+ 4	215	— 2
2nd quarter	86·6	+41	21·6	+ 7	194·7	+25	302·9	+27	67	+ 1	89	—12	50	+ 2	206	— 5
3rd quarter	91·2	+25	18·6	+ 2	216·1	+21	325·9	+21	68	+12	92	+ 1	52	N/C	212	+ 4
4th quarter	100·2	+27	16·1	—19	208·8	+ 9	325·1	+12	70	— 1	89	—19	57	— 3	216	—10
1962 1st quarter	81·1	+11	17·3	—12	179·7	— 1	278·1	+ 1	67	+ 8	72	—27	53	— 1	192	—11
2nd quarter	84·4	— 3	16·5	—24	179·4	— 8	280·3	— 7	71	+ 6	80	—10	53	+ 5	204	— 1

(*Continued on next page*)

Table 3. Fixed Capital Expenditure in Manufacturing Industry at Current Prices (a) (b)

£ million

	Analysis by Industry Group											Analysis by Type of Asset		
	Food, Drink and Tobacco	Chemicals and Allied Industries	Metal Manufacture		Engineering, Shipbuilding and Metal Goods	Vehicles		Textiles, Leather and Clothing	Paper, Printing and Publishing	Other Manufacturing Industries	All Manufacturing Industries			
			Total	Iron and Steel		Total	Motor Vehicles							
	Standard Industrial Classification Orders													
	III	IV	V	Part of V	VI, VII and IX	VIII	Part of VIII	X to XII	XV	XIII, XIV and XVI	III to XVI	Building work	Vehicles	Plant and machinery
1957	107·6	187·6	132·2	108·7	206·6	78·9	50·9	76·7	76·9	64·8	931·3	264·5	44·7	622·1
1958	112·6	197·0	143·5	128·5	204·8	69·8	44·0	63·6	65·2	65·1	921·6	247·0	52·4	622·2
1959	106·0	164·2	129·9	111·7	199·9	68·5	40·0	66·5	60·0	68·4	863·4	219·6	55·1	588·7
1960	128·1	156·7	188·7	167·1	231·2	78·9	55·4	85·8	67·9	90·9	1,028·2	267·9	70·6	689·7
1961	130·6	204·3	254·0	227·3	275·6	95·9	78·6	113·7	83·0	118·9	1,276·0	354·0	72·2	849·8
1957 1st quarter	26·2	42·6	31·1	25·8	50·1	19·2	12·6	19·0	18·6	15·8	222·6	64·9	8·3	149·4
2nd quarter	23·9	48·2	35·1	29·1	44·1	22·5	15·2	20·0	19·7	15·4	228·9	62·7	11·2	155·0
3rd quarter	26·9	44·4	33·5	27·5	50·7	18·3	11·8	17·5	17·7	17·9	226·9	65·4	11·7	149·8
4th quarter	30·6	52·4	32·5	26·3	61·7	18·9	11·3	20·2	20·9	15·7	252·9	71·5	13·5	167·9
1958 1st quarter	28·3	48·7	33·7	29·4	47·2	15·2	9·5	15·6	16·9	15·5	221·1	55·6	13·1	152·4
2nd quarter	27·9	48·4	35·5	31·7	50·5	16·9	10·5	15·1	17·6	15·2	227·1	63·6	13·9	149·6
3rd quarter	28·7	46·3	42·1	38·8	48·9	17·3	10·9	16·8	13·5	16·5	230·1	61·2	12·9	156·0
4th quarter	27·7	53·6	32·2	28·6	58·2	20·4	13·1	16·1	17·2	17·9	243·3	66·6	12·5	164·2
1959 1st quarter	24·7	44·5	28·0	25·1	45·0	16·8	11·7	12·5	15·1	15·2	201·8	48·3	13·7	139·8
2nd quarter	27·9	42·7	30·1	25·6	45·8	15·5	9·0	15·3	15·0	16·0	208·3	50·2	15·3	142·8
3rd quarter	27·1	33·9	41·6	36·9	46·8	14·8	7·6	16·6	13·0	17·7	211·5	52·3	12·1	147·1
4th quarter	26·3	43·1	30·2	24·1	62·3	21·4	11·7	22·1	16·9	19·5	241·8	68·8	14·0	159·0
1960 1st quarter	28·9	37·5	35·8	31·9	50·1	13·9	9·4	18·9	17·1	20·9	223·1	56·4	15·8	150·9
2nd quarter	31·4	37·1	40·8	35·6	51·7	18·2	10·9	22·3	14·8	21·2	237·5	60·5	18·9	158·1
3rd quarter	33·5	38·3	64·7	59·7	57·2	22·7	17·3	19·8	15·2	21·7	273·1	72·8	17·2	183·1
4th quarter	34·3	43·8	47·4	39·9	72·2	24·1	17·8	24·8	20·8	27·1	294·5	78·2	18·7	197·6
1961 1st quarter	31·0	44·7	56·5	51·7	58·9	20·6	17·0	23·6	18·3	26·4	280·0	71·9	18·6	189·5
2nd quarter	33·6	50·5	63·0	55·7	65·2	21·9	18·1	28·8	19·0	31·8	313·8	86·4	20·5	206·9
3rd quarter	32·0	52·1	79·0	72·9	68·6	26·8	21·9	31·4	20·9	29·4	340·2	92·5	17·6	230·1
4th quarter	34·0	57·0	55·5	47·0	82·9	26·6	21·6	29·9	24·8	31·3	342·0	103·2	15·5	223·3
1962 1st quarter	31·7	51·5	54·4	49·5	57·8	22·6	18·8	26·9	20·8	26·3	292·0	82·8	16·8	192·4
2nd quarter											296·9	87·6	16·0	193·3

Table 4. Fixed Capital Expenditure in Distributive and Service Industries at Current Prices (a) (c)

£ million

	Analysis by Industry Group					Analysis by Type of Asset		
	Wholesale Distribution	Retail Distribution	Shipping	Other Industries	Total			
	Standard Industrial Classification							
	810, 831, 832	820	704	XVII, Part of XIX, XXI, Part of XXII and XXIII	XVII, Part of XIX, XX, XXI, Part of XXII and XXIII	Building work	Vehicles	Plant and machinery
1957	57	126	140	304	627	186	291	150
1958	73	130	147	349	699	202	326	171
1959	86	160	161	379	786	230	359	197
1960	94	172	162	439	867	263	391	213
1961	81	200	131	438	850	267	363	220
1959 1st quarter	22	36	33	84	175	54	76	45
2nd quarter	21	39	43	99	202	56	98	48
3rd quarter	20	40	32	88	180	55	78	47
4th quarter	24	45	53	107	229	65	107	57
1960 1st quarter	20	40	38	115	213	66	95	52
2nd quarter	23	41	41	109	214	65	100	49
3rd quarter	23	44	36	99	202	61	89	52
4th quarter	28	47	47	116	238	71	107	60
1961 1st quarter	22	42	37	113	214	61	98	55
2nd quarter	22	47	25	111	205	66	87	52
3rd quarter	17	55	30	109	211	68	89	54
4th quarter	20	56	39	105	220	72	89	59
1962 1st quarter	16	55	25	100	196	68	72	56
2nd quarter					210	73	81	56

Notes:
(a) Expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.
(b) Standard Industrial Classification Orders III to XVI.
(c) Standard Industrial Classification Order XVII (Construction); XIX (Transport and Communication) excluding 701 – Railways, 705 – Port and Inland Water Transport, 706 – Air Transport and 707 – Postal Services and Telecommunications; XX (Distributive Trades); XXI (Insurance, Banking and Finance) excluding savings departments of the Post Office and Trustee Savings Banks; XXII (Professional and Scientific Services) excluding 872 – Educational Services and 874 – Medical and Dental Services: and XXIII (Miscellaneous Services).

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Change in Industry's Stocks in Second Quarter of 1962

PROVISIONAL estimates of the change in the volume of stocks (at 1958 prices) held by manufacturers and distributors in the second quarter of 1962 show a slight reduction of £13 million, after allowance is made for seasonal factors. The decline in the total is made up of a slight rise in the volume of manufacturers' stocks which is more than offset by slight falls in the volume of both wholesalers' and retailers' stocks.

Manufacturers' Stocks

Provisional estimates for the second quarter of 1962 suggest that the total volume of manufacturers' stocks and work in progress (at 1958 prices) rose, after adjustment for seasonal factors, only very slightly – by £6 million – after falling substantially in the first quarter of the year. This small change, which cannot be regarded as significant, was made up of a fall in stocks of finished goods, slightly more than offset by an increase in work in progress – with stocks of raw materials remaining more or less unchanged.

The increase in the stocks and work in progress of manufacturing industry, at book values, in the second quarter of 1962, is provisionally estimated to have amounted to some £20 million. After allowance for price movements, this change amounts to a volume fall (at 1958 prices, not seasonally adjusted) of some £28 million which, when seasonally adjusted, represents a rise of only £6 million.

Detailed second quarter figures, showing the volume of stocks (at 1958 prices, not seasonally adjusted), by six broad industry groups, will as usual not be published until the final second quarter article, due to appear in the *Board of Trade Journal* of October 12, 1962. The provisional figures already available reveal, however, that this unadjusted volume increase (£28 million), in the second quarter of 1962, was primarily due to an increase in work in progress in the engineering sector.

Wholesalers' stocks

It is provisionally estimated that the volume of stocks (at 1958 prices) fell, after adjustment for seasonal factors, by £8 million (just under 1 per cent.) in the second quarter of the year.

Further details of the changes in stocks held by the three main groups of wholesalers (Standard Industrial Classification, Minimum list Headings 810, 831 and 832) will be shown in the final second quarter article but preliminary indications suggest a fall in the stocks held by wholesale distributors (M.L.H. 810) only partly balanced by rises in the stocks held by the other two groups of wholesalers.

Retailers' Stocks

Retailers' stocks fell by £11 million in the second quarter of 1962 (at 1958 prices, seasonally adjusted). Further details of the changes during the period were given in the *Board of Trade Journal* of August 24, 1962, (page 407).

Table 1. Changes in the Volume of Industry's Stocks at 1958 Prices Seasonally Adjusted (a)

£ million

	Manufacturing (b)	Wholesale Distribution (c)	Retail Distribution (d)	Total (e)
Level of stocks at December 31, 1959	4,952	810	946	6,708
1957	+146	+42	+45	+233
1958	+ 36	+14	+16	+ 66
1959	+ 73	+15	+48	+136
1960	+520	+38	+35	+593
1961	+222	+15	+ 5	+242
1957 1st quarter	+ 85	+33	+17	+135
2nd quarter	+ 52	+26	+ 3	+ 81
3rd quarter	+ 23	—13	+14	+ 24
4th quarter	— 14	— 4	+11	— 7
1958 1st quarter	+ 40	—11	— 2	+ 27
2nd quarter	+ 3	—13	—13	— 23
3rd quarter	+ 7	+21	+20	+ 48
4th quarter	— 14	+17	+11	+ 14
1959 1st quarter	— 8	+11	—11	— 8
2nd quarter	— 21	+ 4	+26	+ 9
3rd quarter	+ 25	— 1	+ 9	+ 33
4th quarter	+ 77	+ 1	+24	+102
1960 1st quarter	+ 76	— 6	+29	+ 99
2nd quarter	+120	+16	+21	+157
3rd quarter	+153	+19	— 9	+163
4th quarter	+171	+ 9	— 6	+174
1961 1st quarter	+ 36	+28	+26	+ 90
2nd quarter	+ 46	+ 7	+14	+ 67
3rd quarter	+ 48	—19	—24	+ 5
4th quarter	+ 92	— 1	—11	+ 80
1962 1st quarter	— 60	—11	+33	— 38
2nd quarter	+ 6	— 8	—11	— 13

For footnotes, see end of article.

(*Tables Continued on next page*)

Registrations of British and Foreign Films

THE FOLLOWING are details of films registered by the Board of Trade under the Films Act, 1960, during the week ended Friday, September 7, 1962.

Title of Film	Registered in the Name of	Maker's Name	Registered No.	Playing Time (minutes)	Date of Registration
		BRITISH			
Band of Thieves	Rank Film Distributors Ltd.	Filmvale Ltd.	Br/E 27732	69	September 3
Look At Life Series 14: *Out Of The Sun*	" " "	Rank Film Distributors Ltd.	Br/E 27733	10	September 3
The Boys	Gala Film Distributors Ltd.	Galaworldfilm Productions Ltd.	Br/E 27742	123	September 6
Term Of Trial	Warner Pathe Distributors Ltd.	Remus Films Ltd.	Br/E 27743	131	September 6
Pathe News 62-71	" " "	Associated British-Pathe Ltd.	Br/E 27487	7	September 7
Pathe News 62-72	" " "	" "	Br/E 27488	7	September 7
Movietone News 1735	Twentieth Century Fox Film Co. Ltd.	British Movietonews Ltd.	Br/E 27539	7	September 7
		FOREIGN			
Brushfire	Paramount Film Service Ltd.	Obelisk Production Inc.	F 27734	77	September 3
Born To Sing	Walt Disney Productions Ltd.	Walt Disney Productions	F 27735	94	September 3
A Fire Called Jeremiah	" " "	" "	F 27736	35	September 3
Paris Nous Appartient (Paris Belongs To Us)	Contemporary Films Ltd.	Societe d'Exploitation et de Distribution de Films	F 27737	140	September 4
The 1,000 Eyes Of Dr. Mabuse	Ranworth Film Services Ltd.	Omnia Films	F 27738	104	September 4
Two Weeks In Another Town	Metro-Goldwyn-Mayer Pictures Ltd.	John Houseman Productions Inc.	F 27739	107	September 5
Bird Man Of Alcatraz	United Artists Corporation Ltd.	Norma Productions Inc.	F 27740	148	September 6
Cry Double Cross	Gala Film Distributors Ltd.	UFA International	F 27731	68	September 6
Branded	" " "	Hungarofilm	F 27741	93	September 6
The Life Of Adolf Hitler	British Lion Films Ltd.	Transocean Films	F 27744	102	September 7

The name of the maker of the film 'Hemingway's Adventures Of A Young Man' (F 27727), registered on August 29, 1962, should read: 'Twentieth Century Fox Film Corporation.'
Where the title appears in italics the film forms part of a series. Br/E indicates that the film is a British quota film.

Industry's Stocks (*Continued*)

Table 2. Changes in the Volume (at 1958 Prices) of Stocks Held by Manufacturing Industry (a) (b) £ million

	Analysis by Industry Group							Analysis by Type of Asset		
	Food, Drink and Tobacco	Chemicals and Allied Industries	Metal Manufacture	Engineering, Shipbuilding and Vehicles	Textiles, Leather and Clothing	Other Manufacturing Industries	All Manufacturing Industries	Materials and fuel	Work in progress	Finished goods
	Standard Industrial Classification Orders									
	III	IV	V	VI-IX	X-XII	XIII-XVI	III-XVI			
Level of stocks at December 31, 1959	720	456	384	2,295	606	491	4,952	1,940	1,785	1,227
1957	+10	+48	+28	+ 8	+35	+17	+146	+ 19	+ 65	+ 62
1958	— 6	+ 6	— 8	+ 35	+ 5	+ 4	+ 36	— 96	+ 25	+107
1959	+26	+31	—10	+ 36	—12	+ 2	+ 73	+ 16	+ 47	+ 10
1960	+52	+41	+73	+250	+42	+62	+520	+225	+127	+168
1961	+ 7	+28	+ 6	+130	+29	+22	+222	+ 52	+ 77	+ 93
1957 1st quarter	+97	+ 7	— 6	+ 19	+ 3	— 4	+116	+ 31	+ 31	+ 54
2nd quarter	—10	+23	+ 9	+ 33	+13	+ 6	+ 74	— 26	+ 68	+ 32
3rd quarter	—24	+ 7	+33	— 8	+ 2	+ 1	+ 11	+ 34	+ 19	— 42
4th quarter	—53	+11	— 8	— 36	+17	+14	— 55	— 20	— 53	+ 18
1958 1st quarter	+16	—10	+ 3	+ 41	+18	+ 6	+ 74	— 28	+ 23	+ 79
2nd quarter	+ 1	N/C	+ 6	+ 23	— 7	+ 3	+ 26	— 69	+ 23	+ 72
3rd quarter	— 6	+ 7	— 6	+ 14	—17	— 5	— 13	+ 21	+ 8	— 42
4th quarter	—17	+ 9	—11	— 43	+11	N/C	— 51	— 20	— 29	— 2
1959 1st quarter	+35	+ 1	—14	— 6	+ 8	+ 6	+ 30	— 12	— 4	+ 46
2nd quarter	+15	+ 8	+ 2	— 5	—14	— 4	+ 2	— 6	+ 27	— 19
3rd quarter	— 1	+ 6	+ 5	+ 11	—16	— 1	+ 4	+ 34	+ 16	— 46
4th quarter	—23	+16	— 3	+ 36	+10	+ 1	+ 37	N/C	+ 8	+ 29
1960 1st quarter	+23	—12	+12	+ 53	+27	+11	+114	+ 36	+ 15	+ 63
2nd quarter	+16	+17	+13	+ 65	+14	+16	+141	+ 47	+ 63	+ 31
3rd quarter	+ 9	+20	+39	+ 48	+ 9	+12	+137	+112	+ 20	+ 5
4th quarter	+ 4	+16	+ 9	+ 84	— 8	+23	+128	+ 30	+ 29	+ 69
1961 1st quarter	+17	— 1	+ 8	+ 14	+20	+18	+ 76	+ 19	+ 23	+ 34
2nd quarter	— 1	+ 9	— 1	+ 28	+20	+14	+ 69	+ 6	+ 46	+ 17
3rd quarter	+10	+12	+ 5	+ 25	—17	— 3	+ 32	+ 57	+ 15	— 40
4th quarter	—19	+ 8	— 6	+ 63	+ 6	— 7	+ 45	— 30	— 7	+ 82
1962 1st quarter	+16	—17	—17	— 8	+13	— 4	— 17	— 37	— 18	+ 38
2nd quarter							+ 28	— 18	+ 55	— 9

Table 3. Changes in the Volume (at 1958 Prices) of Stocks Held by Distributors (a) £ million

S.I.C. M.L.H.			1st quarter	2nd quarter	3rd quarter	4th quarter	Year	Level of stocks, at December 31 1959
810	Wholesale distributors	1959	+37	+ 5	— 5	—27	+10	548
		1960	+32	+11	+22	—39	+26	
		1961	+55	+ 1	— 1	—47	+ 8	
		1962	+20					
831	Dealers in coal, builders materials, etc.	1959	—11	+ 4	+15	— 3	+ 5	77
		1960	—12	+ 2	+10	+ 4	+ 4	
		1961	—11	+ 3	+ 8	+ 1	+ 1	
		1962	—12					
832	Dealers in industrial materials and machinery	1959	..	..	..	..	N/C	185
		1960	—11	+ 3	+13	+ 3	+ 8	
		1961	— 1	+ 3	+ 1	+ 3	+ 6	
		1962	— 4					
	Total wholesale distributors (c)	1959	+26	+ 5	+23	—39	+15	810
		1960	+ 9	+16	+45	—32	+38	
		1961	+43	+ 7	+ 8	—43	+15	
		1962	+ 4	— 9				
820	Retail distributors (d)	1959	+21	+26	— 5	+ 6	+48	946
		1960	+71	+13	—25	—24	+35	
		1961	+63	+14	—41	—31	+ 5	
		1962	+79	—22				

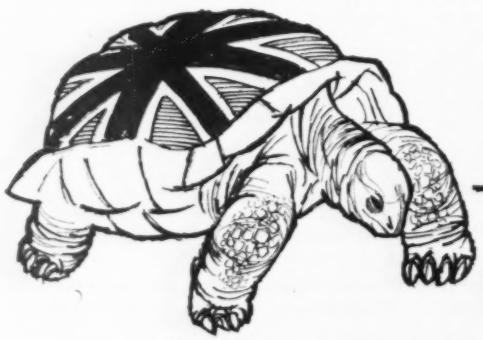
(*Tables continued on next page*)

Industry's Stocks (*Continued*)

Table 4. Changes in the Value (at Book Values) of Stocks Held by Manufacturers and Distributors (a) £ million

		1st quarter	2nd quarter	3rd quarter	4th quarter	Year	Level of stocks at December 31, 1959
Manufacturers (b)	1957	+174	+ 60	+ 67	— 48	+253	
	1958	+ 54	+ 22	— 27	— 29	+ 20	
	1959	+ 27	+ 13	+ 17	+ 80	+137	5,048
	1960	+128	+181	+128	+161	+598	
	1961	+110	+102	+ 45	+ 53	+310	
	1962	+ 9	+ 20				
Wholesalers (c)	1957	+ 53	+ 21	+ 13	— 33	+ 54	
	1958	— 8	— 8	+ 37	— 15	+ 6	
	1959	+ 17	+ 5	+ 25	— 24	+ 23	819
	1960	+ 7	+ 18	+ 53	— 33	+ 45	
	1961	+ 41	+ 15	+ 10	— 42	+ 24	
	1962	+ 4	— 1				
Retailers (d)	1957	+ 60	— 6	+ 3	— 2	+ 55	
	1958	+ 36	— 16	+ 5	— 4	+ 21	
	1959	+ 20	+ 22	— 3	+ 6	+ 45	945
	1960	+ 68	+ 15	— 19	— 20	+ 44	
	1961	+ 73	+ 19	— 29	— 27	+ 36	
	1962	+ 87	— 5				
Total (e)	1957	+287	+ 75	+ 83	— 83	+362	
	1958	+ 82	— 2	+ 15	— 48	+ 47	
	1959	+ 64	+ 40	+ 39	+ 62	+205	6,812
	1960	+203	+214	+162	+108	+687	
	1961	+224	+136	+ 26	— 16	+370	
	1962	+100	+ 14				

Notes relating to Tables 1–4.
(a) The estimates are shown to the nearest £ million, but should not be regarded as accurate to this degree. (b) Standard Industrial Classification Orders III-XVI.
(c) S.I.C. Minimum List Headings 810, 831, 832. (d) S.I.C. Minimum List Heading 820.
(e) S.I.C. Orders III-XVI and XX.



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Wholesale Price Index Numbers

Prices of Basic Materials Lower in August

PRICES of basic materials and fuel have been tending to fall since the early months of this year and there was a further decline in August. The index for manufacturing industry as a whole for July-August is about 99.7 compared with 100.9 in the second quarter and 101.6 in the first. The slightly downward trend applies to both the food and non-food sectors of industry.

The underlying trend in wholesale prices of manufactures continues to be slightly upwards. In August itself the provisional index for total home market sales shows little change on July but for the two months together the index is about 118.6 as against 118.3 for the second quarter and 118.1 in the first.

Materials and fuel used in broad sectors of industry.

The August index for materials and fuel used in food manufacturing was affected by the steep fall in the prices of home-grown cereals; bacon-factory pigs and imported bacon were considerably cheaper, but raw sugar prices were slightly higher. Owing to lower costs for a large number of its constituent items, the index for materials and fuel used in the chemicals and allied industries has been dropping steadily since January and now stands at a level 3½ per cent. below that of August last year. The indices for mechanical and electrical materials are both 1 per cent. higher than in August 1961, but they have been showing a downward trend since May, mainly owing to the fall in non-ferrous metal prices. Textile materials fell by 1½ per cent. during the month, reflecting the lower prices for raw cotton, wool and jute. The prices of materials used in the timber and paper industries and in building remained steady.

Output of broad sectors of industry.

The August index for home market sales of products of the food-manufacturing industry fell back moderately, mainly because of lower bacon prices. The latest provisional figures for the output of the chemicals and allied industries indicate falling prices over the past six months, in particular for fertilizers and vegetable and animal oils and fats. There were only marginal changes since July in the output indices of the textile, clothing and footwear, timber and paper industries.

1. Materials Purchased by Broad Sectors of Industry — 1954 = 100

(monthly averages)

1958 Standard Industrial Classification Minimum List Headings		1961					1962							
		Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	Aug.
Order III to XVI	Basic materials and fuel used in manufacturing industry.	100·7	100·2	99·4	100·1	100·3	101·6	101·7	101·6	101·6	100·9	100·1*	100·4*	99·1*
	Basic materials	96·5	95·9	95·0	95·6	96·0	97·0	97·2	97·1	97·1	96·4	95·5*	95·7*	94·3*
	Fuel	133·8	133·8	133·8	134·2	133·9	136·5	136·5	136·5	136·5	136·0	136·2*	136·2*	136·4*
Orders IV to XVI	Basic materials and fuel used in manufacturing industry, other than food, drink and tobacco manufacturing industries.	104·8	104·5	103·7	103·4	103·3	103·9	104·1	103·8	103·8	103·4	102·8*	102·6*	102·2*
	Basic materials other than fuel.	99·9	99·4	98·4	98·0	97·9	98·2	98·4	98·1	98·0	97·7	96·9	96·7*	96·2*
211 to 229	Materials and fuel used in the food manufacturing industries.	92·4	91·6	90·8	92·9	94·1	96·3	96·3	96·4	96·2	95·0	94·1*	94·9*	92·9*
263 to 277	Materials and fuel used in the chemicals and allied industries.	107·6	107·2	106·3	105·8	105·9	106·3	106·1	105·4	105·1	105·0	104·3*	104·0*	104·0*
331 to 349 (excluding 342)	Materials and fuel used in the mechanical engineering industries	128·7	128·7	128·4	128·4	128·9	129·0	129·4	130·3	130·4	130·4	130·2*	130·2*	130·1*
361	Materials and fuel used in the electrical machinery industry.	118·9	118·9	118·8	118·8	119·0	119·0	119·3	120·2	120·2	120·3	120·2*	120·2*	120·1*
Order X	Materials and fuel used in the textile industries	92·7	92·0	91·1	91·1	90·9	90·9	91·8	91·7	91·9	91·5	91·4*	91·4*	90·0*
Order XIV	Materials and fuel used in the timber industries	111·7	111·5	110·8	110·8	110·9	109·9	109·8	109·2	109·0	109·0	108·8*	108·8*	108·8*
Order XV	Materials and fuel used in the paper industries	108·7	108·6	108·0	108·1	107·7	107·5	107·4	107·4	106·9	106·9	106·9*	105·6*	105·7*
Order XVII	Construction materials	118·9	118·8	119·1	119·3	119·4	119·6	119·7	120·1	120·4	120·5	120·5*	120·6*	120·6*
Part of Order XVII	House building materials	118·6	118·6	118·9	119·1	119·1	119·5	119·7	119·6	120·1	120·2	120·2*	120·3*	120·3*

* Provisional figure.

(*Continued on next page*)

Economic Trends

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HMSO

Wholesale Price Index Numbers (*Continued*)

2. Output of Broad Sectors of Industry — 1954 = 100

(monthly averages)

1958 Standard Industrial Classification Minimum List Headings		1961					1962							
		Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July	Aug.
Orders III to XVI	All manufactured products: Total sales	116·4	116·5	116·5	116·8	117·0	117·2	117·5	117·7	117·5	117·6	117·8*	117·9*	117·9*
	Home market sales	116·9	117·1	117·1	117·3	117·5	117·8	118·1	118·3	118·2	118·3	118·5*	118·7*	118·6*
Order IV to XVI	Products of manufacturing industries, other than food, drink and tobacco: Total sales	118·1	118·1	118·2	118·4	118·6	118·7	119·0	119·1	118·9	119·0	119·1*	119·2*	119·2*
	Home market sales	119·3	119·4	119·5	119·6	119·7	119·9	120·2	120·3	120·2	120·3	120·5*	120·6*	120·6*
211 to 229	Products of the food manufacturing industries: Home market sales	107·2	107·1	107·2	107·9	108·3	109·6	110·3	110·6	110·4	110·5	110·9*	111·5*	111·1*
263 to 277	Chemicals and allied industries: Total sales	102·9	102·6	102·4	102·9	103·0	102·8	103·3	103·1	103·0	102·6	102·4*	102·2*	102·2*
	Home market sales	105·2	105·0	104·7	105·0	105·0	105·1	105·2	105·1	104·9	104·7	104·1*	103·9*	103·9*
311 and 312	Iron and steel industries: Total sales	126·1	126·4	126·4	126·4	127·1	127·0	126·9	128·8	128·8	129·2	129·2	129·2*	129·2*
	†Home market sales	130·2	130·2	130·2	130·3	130·7	130·7	131·0	133·7	133·9	133·9	133·9	133·9	133·8*
Order X	Textile industries other than clothing: Total sales	104·2	104·3	103·5	103·8	104·2	104·1	104·0	104·2	103·8	103·6	103·5	103·4*	103·4*
	Home market sales	103·2	103·2	103·1	102·8	103·0	102·8	102·6	102·6	102·5	102·5	102·5	102·5*	102·4*
Order XII	Clothing and footwear: Home market sales	109·2	109·3	109·3	109·5	109·6	109·7	109·9	110·0	110·4	110·7	110·7	110·7*	110·6*
Order XIV	Timber industries: Home market sales	110·6	110·6	110·7	110·9	111·1	112·0	112·3	112·2	112·0	112·0	112·1	112·1*	112·1*
481 to 483	Paper industries: Home market sales	110·2	110·5	110·5	110·8	110·9	111·1	111·1	111·1	111·1	111·0	111·1	110·9*	110·9*
Order XVII	New construction‡		117			120			121			122*		

* Provisional figure. † The index for Blast Furnaces and Iron and Steel Melting and Rolling: Home Market Sales (Minimum List Headings 40, 41 of the 1948 Standard Industrial Classification) has been discontinued. An equivalent index is published in Table 3 (a) of this article under the title 'Other steel goods (excluding tubes)'. ‡ Index of building costs; figures relate to average for the quarter.

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Wholesale Price Index Numbers (*Continued*)

3 (a). Commodities Produced in the United Kingdom — 1954 = 100

Commodities are listed by industries (as defined in the Standard Industrial Classification 1958) whose principal products they are. The Standard Industrial Classification references appear in the article on wholesale price index numbers published in the *Board of Trade Journal* of February 2, 1962.

(monthly averages)

	1961	1962			
	Aug.	Feb.	June	July	Aug.
Coal†	142·5	151·6	150·7	150·8*	150·9*
Slates	141·1	141·1	141·1	141·1*	141·1*
Salt	107·2	113·6	114·0	114·0	114·0
Flour	108·7	113·0	113·0	113·0	113·0*
Sugar, refined	108·1	112·7	109·8	112·6	113·7
Chocolate and sugar confectionery	102·0	101·9	105·3	105·5*	105·6*
Beer	100·0	101·2	102·2	102·2*	102·2*
Tobacco and cigarettes	126·8	126·8	126·8	126·8	126·8
Hard coke	163·8	163·8	164·0	164·0	164·0
Motor spirit, standard grade (including duty)	109·4	109·4	109·4	109·4	109·4
Medium fuel oil (950 secs.)	140·8	140·8	139·9	139·9	139·9
Lubricating oils and greases	121·5	124·2	126·6	126·6	126·6
General chemicals	103·7	102·7	101·7	101·6*	101·6*
Pharmaceutical chemicals	78·9	75·5	69·0	69·0	68·8*
Pharmaceutical preparations	98·6	98·9	98·3	98·3	98·4*
Toilet preparations	120·1	121·1	123·5	124·7	125·0*
Paint for building and decorating	110·6	112·9	112·9	112·9*	112·9*
Soap	129·1	133·4	134·1	134·1*	134·1*
Soapless detergents	97·8	98·4	98·4	98·3	98·3*
Synthetic resins and plastics materials	80·2	78·2	78·0	78·0	78·0*
Steel sheets	127·2	127·6	133·9	133·9	133·7
Tinplate	114·9	116·0	120·8	120·8	120·8
Other steel goods (excluding tubes)	130·6	131·4	133·4	133·4	133·4*
Steel tubes	134·3	134·5	138·8	138·8	138·8
Iron castings	140·1	140·3	141·9	142·2	142·5*
Aluminium and aluminium alloy products:					
Extruded and drawn	132·3	132·3	132·3	132·3	132·3
Rolled	132·4	130·0	122·8	122·8	122·8
Castings	128·8	128·8	128·2	127·0	127·0
Forgings	128·7	128·7	128·7	128·7	128·7
Brass, ingot 65-35, B.S. 1400: B3, delivered	105·3	103·2	100·8	98·7	95·7
Photographic paper and films, etc.	117·5	117·8	117·8	117·8	117·8*
Spectacles, etc.	111·5	115·6	120·9	120·9	120·9*
Dental goods	124·7	126·4	126·4	126·0*	126·0*
Gramophone records	115·7	115·7	117·2	117·2	117·2*
Domestic electrical appliances	101·8	101·6	102·1	102·1*	102·1*
Perambulators, etc.	116·6	119·2	120·6	120·6	120·6*
Tools and implements	137·9	141·6	142·3	142·3	142·3
Cutlery	127·1	127·8	128·0	128·0	128·2
Cutlery (other than razors and razor blades)	121·8	123·9	120·6	120·6	121·1
Spoons and forks	127·2	133·2	134·1	134·1	134·5
Galvanized cisterns, tanks and cylinders	132·9	139·0	145·0	145·0	145·0
Domestic hollow-ware	138·1	138·3	139·0	138·7	138·1
Domestic gas appliances	108·2	108·3	108·2	108·2	109·5
Cotton yarn	97·4	91·8	90·8	90·0	89·9
Spun rayon yarn	99·1	93·0	91·3	91·8	91·2*
Irish linen yarns (wetspun)	101·1	101·1	101·1	101·1	101·1
Cotton cloth	106·7	99·1	96·2	95·8	95·5
Linen	103·0	103·9	103·9	103·9	103·9*
Rayon and acetate fabric	114·4	114·3	113·0	112·7	112·1*
Wool tops	80·6	78·1	78·7	78·7	78·2
Worsted yarns	90·5	88·9	89·5	89·5	88·9
Harris tweed	93·7	93·7	100·0	100·0	100·0
Serge cloth	90·2	90·2	90·0	89·9	90·8
Jute yarn	131·4	113·0	104·2	107·4	105·0
Jute piece-goods	125·0	109·0	105·9	108·4	106·5
Rope, twine and net	112·0	111·1	110·5	111·7	111·6*
Hosiery and other knitted goods	95·1	95·8	95·6	95·4*	95·3*
Carpets and rugs	113·8	113·8	118·4	118·9*	118·9*
Canvas goods and sacks	102·8	109·3	111·0	111·0	109·2
Leather for footwear	108·1	105·8	104·9	104·9*	104·9*
Travel goods	117·3	117·1	117·3	117·3	117·3
Made-up clothing	108·5	109·0	109·7	109·7*	109·7*
Weatherproof outerwear	101·6	101·9	102·0	101·8*	101·8*
Men's and boys' tailored outerwear	110·5	110·9	111·3	111·3*	111·3*
Women's and girls' tailored outerwear	105·1	105·6	107·8	107·8*	107·8*
Women's and girls' light outerwear	105·8	107·3	107·8	107·8*	107·8*
Footwear (excluding rubber)	110·1	111·4	112·3	112·4*	112·4*
Refractory goods, including bricks	136·6	136·7	139·3	139·3	139·3*
Non-refractory goods, including bricks	122·1	122·1	122·7	123·0*	123·0*
Building bricks, common, other than fletton, *ex works*	124·0	124·2	124·1	124·1*	124·1*
Building bricks, fletton, common, *delivered*	117·5	115·8	115·8	115·8	115·8
Electrical porcelain	122·5	122·5	122·5	123·5	123·8
Domestic china and earthenware	128·1	128·4	135·5	135·5	135·5
Glass (other than containers)	124·3	128·6	128·6	128·6*	128·6*
Glass containers	122·2	122·3	122·3	122·3*	122·3*

† This index is based on prices ruling on the last day of the month.
* Provisional figure.

(*Continued on next page*)

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Wholesale Price Index Numbers (*Continued*)

3 (a) (*Continued*). Commodities Produced in the United Kingdom — 1954 = 100

(monthly averages)

	1961	1962			
	Aug.	Feb.	June	July	Aug.
Cement, delivered	120·0	120·0	120·0	120·0	120·0
Abrasive paper and cloth	123·4	123·4	123·4	123·4	123·4
Cast stone and cast concrete products	107·9	109·0	109·0	109·0	109·0
Home grown hardwood	100·3	98·1	97·5	97·5	97·5*
Domestic furniture	113·8	116·4	116·9	116·9*	116·9*
Bedding, etc.	105·9	109·1	109·2	109·2	109·2*
Wooden boxes, packing cases, crates, etc.	113·8	113·7	114·0	114·0	114·0
Paper and board	109·6	109·6	109·4	109·5	109·5*
Cardboard boxes, cartons and fibreboard packing cases	108·5	109·5	110·0	109·5	109·5*
Wallpaper	123·5	131·2	131·2	131·2	131·2
Paper bags	112·2	112·2	112·2	112·2	112·2
Manufactured stationery	114·7	118·1	118·1	118·1	118·1*
Other manufactures of paper and board	105·5	104·6	102·1	102·1	102·1*
Rubber tyres and tubes	123·2	121·1	120·2	120·2	120·2
Rubber goods (other than tyres and tubes)	117·9	117·2	115·5	115·3*	115·2*
Rubber footwear	126·5	126·5	125·9	125·9	125·9
Linoleum and felt base	132·2	128·7	126·5	126·5	126·5*
Brushes and brooms	126·0	127·5	131·5	131·7	131·7
Toys and games	114·7	116·6	116·5	116·6	116·6*
Sports equipment	125·2	128·5	129·1	129·1	129·1*
Pens and pencils	112·7	112·7	112·8	112·8*	112·8*
Other stationers' goods	125·5	125·5	125·5	125·5	126·7
Plastic mouldings	102·1	102·1	102·1	102·1	102·1*

* Provisional figure.

3 (b). Commodities Wholly or Partly Imported into the U.K. — 1954 = 100

(monthly averages)

	1961	1962			
	Aug.	Feb.	June	July	Aug.
Hides and skins	104·9	98·3	96·2	94·4	93·9*
Imported	112·2	106·4	103·6	100·7	99·8
Native	93·9	86·3	85·0	85·0	85·0*
Non-ferrous metals:					
Aluminium, virgin ingot, delivered	119·2	117·3	115·4	115·4	115·4
Copper, ex-ship, wharf or warehouse	92·9	94·5	94·2	94·2	94·2
Lead, ex-ship, wharf or warehouse	67·1	60·8	59·8	55·8	52·9
Nickel, refined, delivered	135·6	135·6	131·9	131·9	131·9
Tin, ingot, min. 99·75 per cent., settlement price	131·3	132·1	121·7	119·9	118·3
Zinc, ex-ship, wharf or warehouse	97·7	87·9	85·6	84·5	82·5
Oils, resins and gums:					
Linseed oil, crude, naked, ex-works	155·0	141·4	133·5	132·9	131·0
Palm oil, c.i.f., in bulk	99·4	100·6	92·1	92·0	90·5
Whale oil, acid, soft, naked, ex-works	81·9	72·1	72·1	72·1	70·2
Pyrites, c.i.f., United Kingdom ports	64·9	61·5	58·7	58·7	58·0
Rubber, No. 1 R.S.S. one month future	125·0	122·1	111·3	111·4	110·4
Sulphur, crude (for acid making), c.i.f.	72·1	74·8	74·1	74·1	74·1
Textiles:					
Coir yarn, c.i.f. United Kingdom ports	157·4	160·1	156·3	156·7	156·5
Cotton, raw	73·7	74·8	73·4	72·8	72·5*
Jute, raw, 'Mill Lightnings,' c.i.f Dundee	148·4	133·4	108·8	112·0	112·6
Jute, raw, 'Mill Hearts,' c.i.f. Dundee	137·7	113·9	109·0	112·9	112·1
Silk, raw, delivered mill	111·5	104·4	123·2	126·6	127·6*
Sisal, East Africa No. 1 Grade, c.i.f. London	105·2	111·9	115·5	115·5	115·5
Wool, raw	78·6	76·2	77·9	77·7	74·5*
Crossbred, medium and coarse, c.i.f. U.K.	89·8	84·1	83·6	83·6	82·8
Crossbred, fine, c.i.f. U.K.	80·6	77·2	78·7	78·7	75·3
Merino, c.i.f. U.K.	73·0	71·4	74·4	74·0	69·6
Timber:					
Imported hardwood (ex-yard or wharf)	112·7	110·7	109·8	109·4	109·4*
Imported plywood (delivered to consumers)	98·8	100·0	98·1	97·8	97·8*
Imported softwood (delivered to consumers)	106·9	105·3	103·8	103·8	103·8*
Woodpulp, imported	100·4	96·6	96·0	94·3*	94·3*

* Provisional figure.

Notes on Wholesale Prices

In future, the notes on index numbers of wholesale prices (1954 = 100) will be published only in the annual article, which normally appears in February. They were last published in the issue of February 2, 1962.

Correspondence about wholesale price index numbers should be addressed to Statistics Division, Board of Trade, Room 202, Hillgate House, 35 Old Bailey, E.C.4. Telephone inquiries should be made to City 5757, Ext. 7299 or 7250.

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Government Surplus Sales by Auction

War Office

1962	Stores	Location	Auctioneers
Sept. 18-19 .	Machine tools and miscellaneous stores .	Command Ordnance Depot, Coypool, Marsh Mills, Plymouth. (*Sale at Kinterbury House.*)	Woolland Son & Manico (Dept. L), Kinterbury House, St. Andrews Cross, Plymouth. (Tel.: 69292.)
Sept. 25-26 .	Machine tools and miscellaneous stores including:	W.D. Storage Depot, Rotherwas, Hereford .	Russell, Baldwin & Bright Ltd. (Dept. L), 20 King Street, Hereford. (Tel.: 4366.)

Romney huts; Nissen huts; Chaseside shovels; fork lift and platform trucks; fire trailer pumps; generators and electric motors; cable and electric wire; used tyres; lightweight covers; tools; receivers and reception sets; telephone equipment; Avometers; metal partitioning; motor and other lawn mowers; M.T. and aircraft spares; electrical and wireless spares; tables, chairs, bedroom and other furniture and household equipment; carpets and coir matting; leather jerkins; ground sheets; miscellaneous clothing; Oldfield & Schofield, Denham, Dean, Smith & Grace, Smallpiece, Ward and other lathes; Adcock & Shipley, Jones & Shipman, Tauco and other drills; Rowlands, Luke & Spencer Wright, Stamford and other grinders; Denbigh, Rapido & Rex hacksaw machines; presses and other machine tools, etc.

Sept. 25-27 .	Vehicles, trailers, earth moving and lifting equipment, motor cycles, etc., including:	W.D. Storage Depot, Ruddington, Notts. .	Walker, Walton & Hanson (Dept. L), Byard Lane, Bridlesmith Gate, Nottingham. (Tel.: 54272.)

220 saloons, limousines and estate cars (including 93 Ford 'Anglias', 'Populars' and Morris 'Minors'); 245 Land Rovers; coaches, dual purpose vehicles, light, medium, and heavy load carriers (some fitted with diesel engines); heavy diesel wheeled tractors by A.E.C.; Diamond 'T' mobile tankers, 150 gallons to 2,500 gallons; trailers 10 cwts. to 20 tons; mobile workshops (fitted generator, lathe, vertical drilling machine, valve re-seater, etc.); excavators by Newton Chambers and Ruston Bucyrus; Caterpillar 'D8' tractors; mobile cranes by Coles, Neals, and Lorain; motorized graders by Aveling Austin, and Blaw Knox; scrapers by Onions; diesel road rollers (8½ tons) by Aveling Barford; dumpers by Johnson, Muir Hill, Thwaites and Wither; fork lift trucks; snow ploughs; Bedford Lewin sweepers; trailer mounted fire pumps; factory trucks; 440 solo and combination motor cycles by Ariel, B.S.A., James, Matchless, Norton, and Triumph, etc.

Oct. 4 .	Machine tools and miscellaneous stores .	Technical Stores Depot, Old Dalby, Leics. (*Sale at Melton Mowbray.*)	Shouler & Son (Dept. L), 1 Norman Street, Melton Mowbray, Leics. (Tel.: 3081.)

For each sale shown obtain catalogue, available 14 days prior to date of sale, from the appropriate auctioneer price 1s. 0d. (*Postal Orders only*).

MACHINE TOOLS – Sale by Tender

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Application for tender forms should be made to War Office, Directorate of Disposals, First Avenue House, High Holborn, London, W.C.1. Tender forms must be returned by September 27, 1962.

Air Ministry

1962	Stores	Location	Auctioneers
Sept. 14 .	Huts and buildings, Nissen huts, brick buildings, concrete bases.	Royal Air Force Station, Fairford, Glos. .	Moore, Allen & Innocent, Lechlade, Glos. (Tel.: Lechlade 303.) Catalogues free.
Sept. 27 .	Miscellaneous stores and equipment . .	No. 25 Maintenance Unit, Royal Air Force, Hartlebury, Worcs.	Nock & Joseland, Bank Buildings, Kidderminster, Worcs. (Tel.: Kidderminster 2053.)

The above sale will include clothing and webbing equipment, footwear repair material, balloon fabric, cordage, dinghies, parachutes, cameras, projectors and bromide paper, radio and electrical equipment, furniture and general stores.

Oct. 3 .	Miscellaneous stores and equipment . .	No. 16 Maintenance Unit, Royal Air Force, Stafford.	South & Stubbs, Eastgate Street, Stafford (Tel.: Stafford 2331.)
Oct. 4 .	Huts and buildings, Nissen and Seco type huts, 1,000-gallon petrol tank, 30,000-gallon high level water tank.	Royal Air Force Station, Treleaver, Cornwall	John Coad & Son, 10 Coinagehall Street, Helston, Cornwall. (Tel.: Helston 2661.) Catalogues free.
Oct. 9 .	Huts and buildings, one small T.2 hangar, one Bellman hangar, 73 Nissen huts, 37 Seco huts, seven 12,000-gallon petrol tanks.	Royal Air Force Station, Weston Zoyland, Somerset.	W. H. Palmer & Sons, 14 Castle Street, Bridgewater, Somerset. (Tel.: Bridgewater 2061.) Catalogues free.
Oct. 17 .	Miscellaneous stores and equipment . .	No. 7 Maintenance Unit, Royal Air Force, Quedgeley, Glos.	Bruton Knowles & Co., Albion Chambers, King's Street, Gloucester. (Tel.: Gloucester 2167.)

Catalogues for the above sales may be obtained within fourteen days of the advertised date of sale, on application to the auctioneers. Catalogues for all sales held at Maintenance Units cost 1s. 0d. each (*Postal Orders only*).

'Economic Trends' – August

The August issue of 'Economic Trends', contains an article by the Ministry of Power on fuel and power consumption in 1961. This issue also contains the analysis of overseas sterling holdings for the second quarter of 1962. Copies: H.M. Stationery Office. 5s.

'Which' – September

The September issue of 'Which' contains articles on electric irons, children's encyclopædias, the Velcro fastener, floor polish and purchase tax on sweets and chocolate. Copies: Consumers' Association Ltd., London. Annual subscription £1.

Financial Statistics for August

The August issue of Financial Statistics contains in addition to the regular tables a new table showing the amounts on deposit at the various rates of interest paid, with the special investment departments of the Trustee savings banks at half-yearly dates from 1952 to 1962. It is published by H.M. Stationery Office, price 7s. 6d.

British Shipbuilding

The 1962 edition of 'The British Shipbuilding Compendium' is now available. Copies: The British Shipbuilding Compendium, 6 Bromley Grove, Shortlands, Kent. Price 25s.

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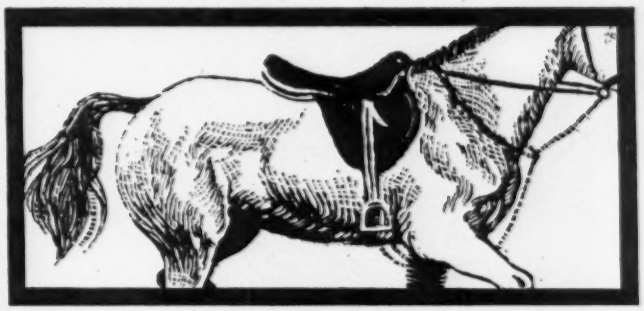

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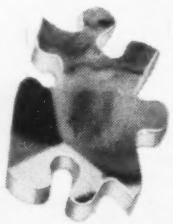

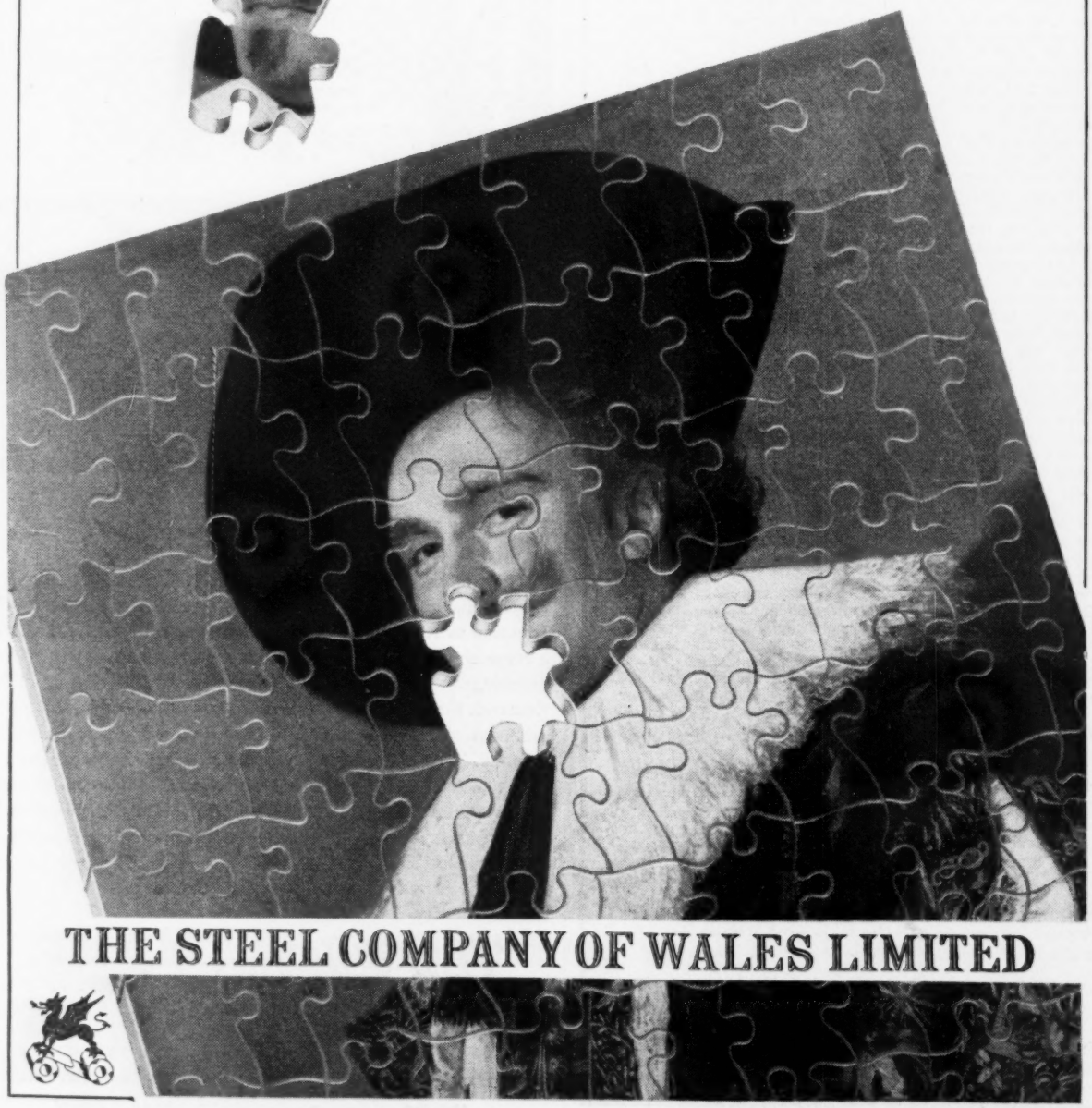

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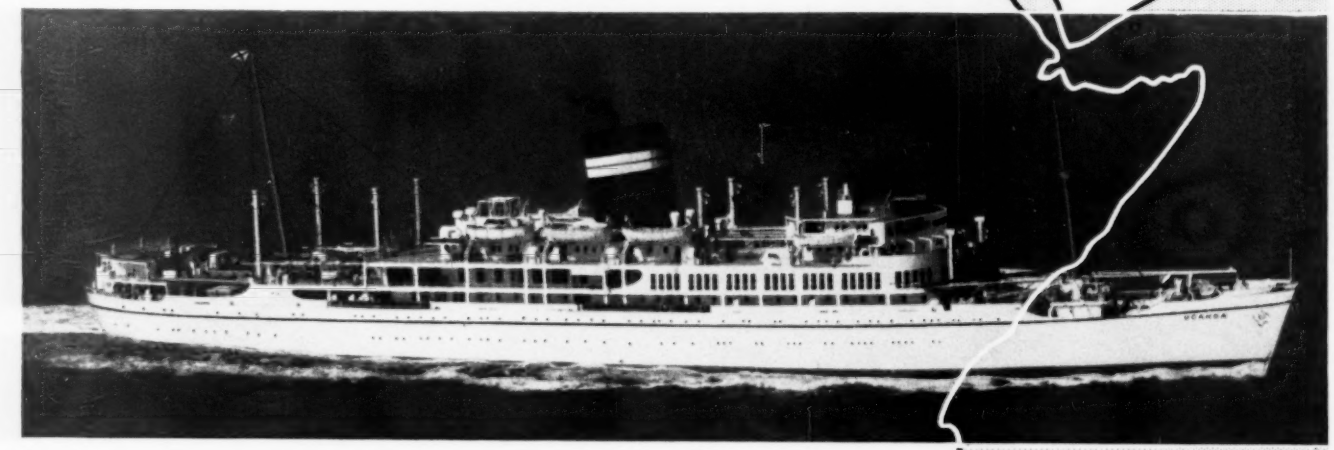

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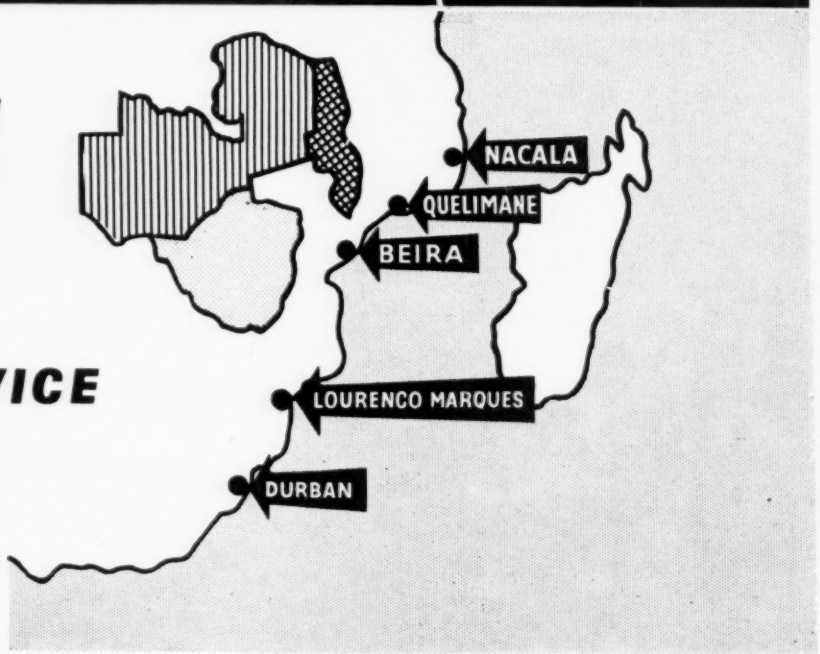

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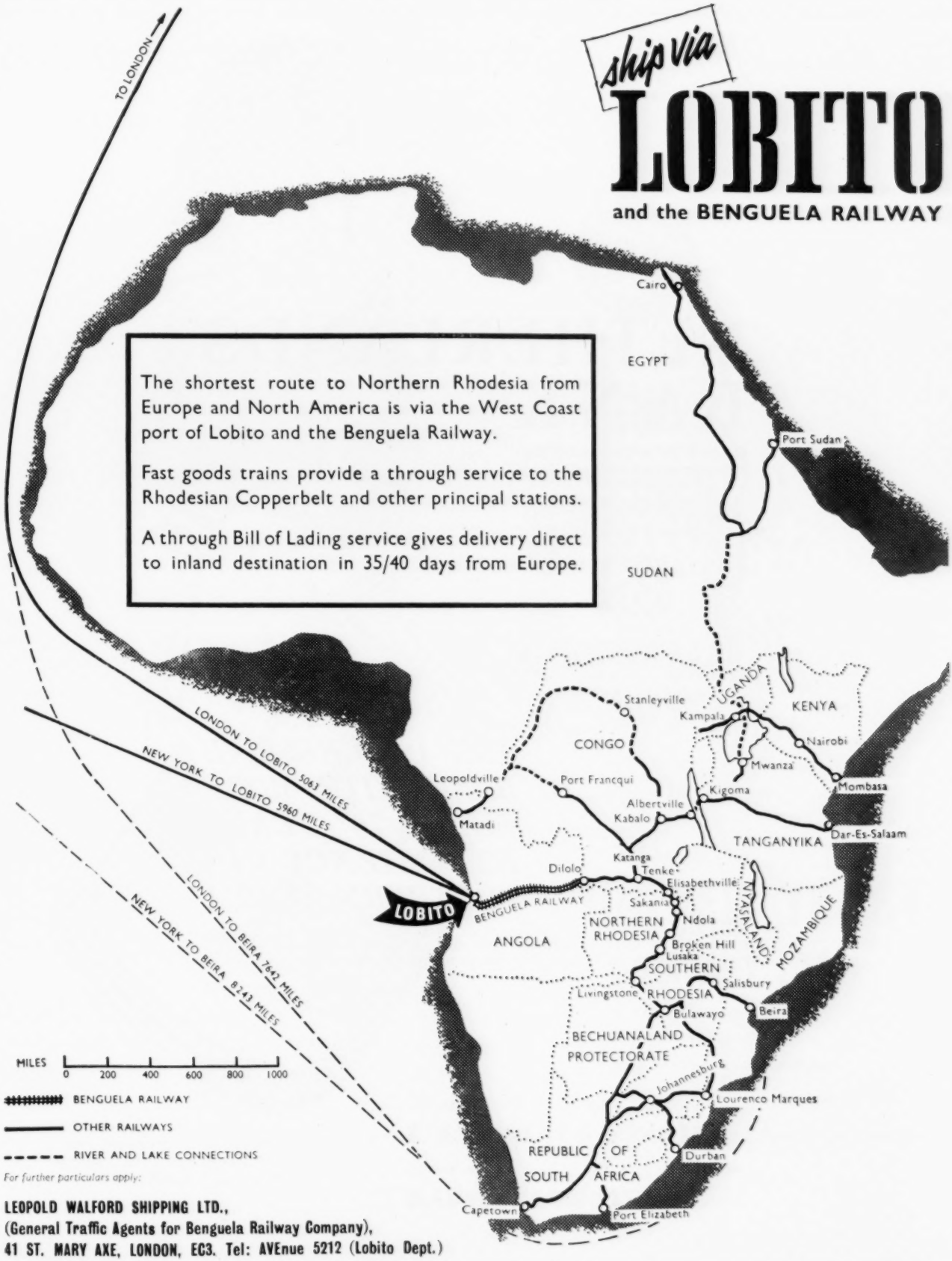

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Cover: Some of the African farm owners in the Mzengezi native purchase area are using modern and advanced methods of farming.

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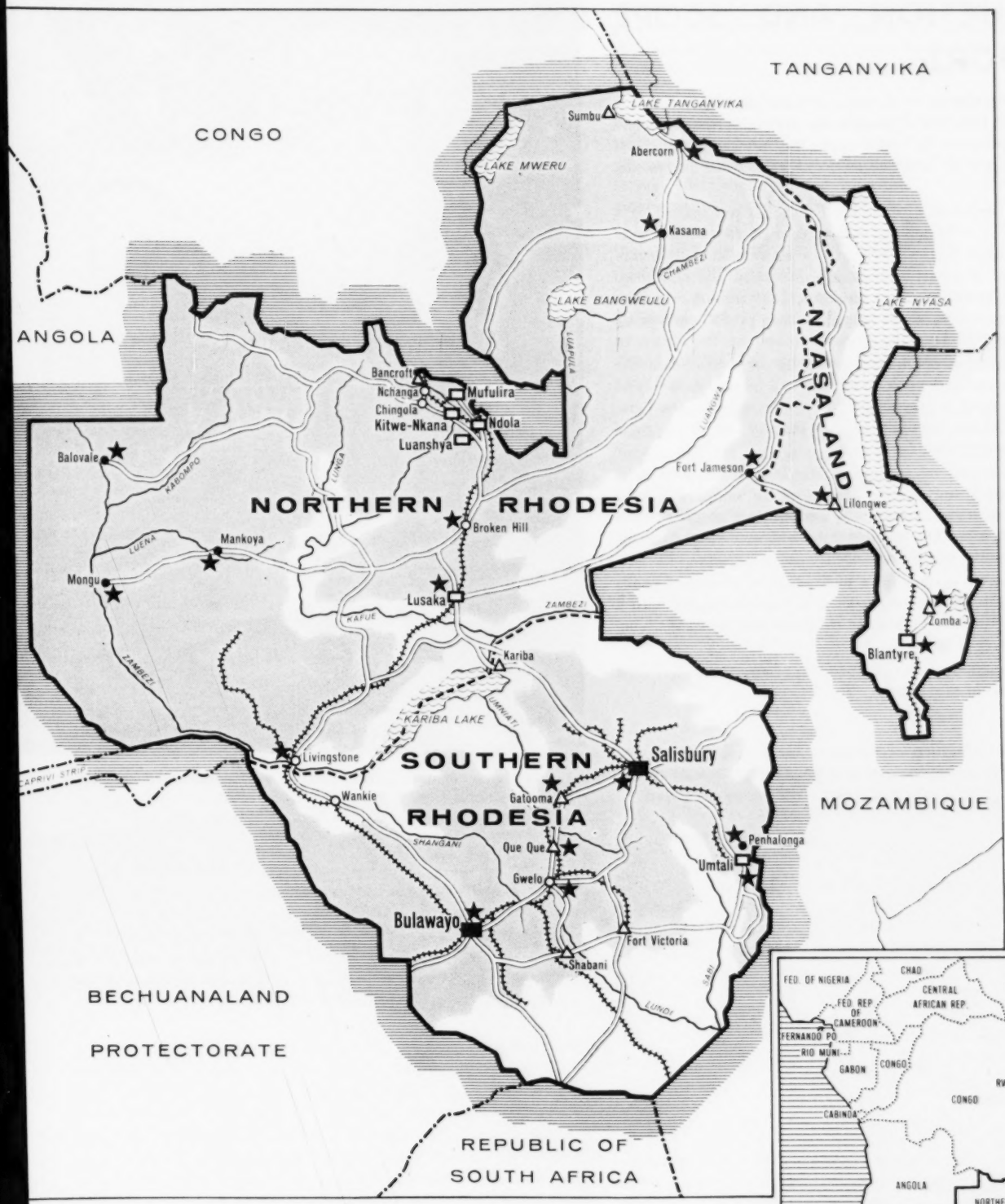
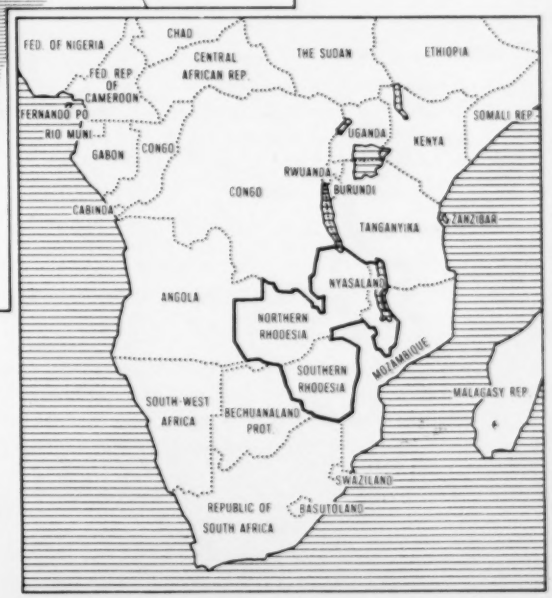
Photographs by courtesy of the Public Relations Division of the Ministry of Home Affairs, Government of Rhodesia and Nyasaland.

in Rhodesia and Nyasaland





Main cities and towns

- City
- Principal town 20,000 or over
- Town 10,000 – 20,000
- Settlement or village 4,000 – 10,000
- Place of local importance – below 4,000
- Airfield
- Railways
- Main roads
- Land over 3,000 feet

INTRODUCTION AND SCOPE OF REPORT

This report is designed to provide information concerning the African, as distinct from the European, market in the Rhodesias and Nyasaland. This market has been expanding during recent years and may be expected to continue to do so as African purchasing power rises.

The African's contribution to a gross national product of £558 million in 1960 was £196 million, an increase of £65 million over the comparable figure in 1954. Within this figure, £85 million represented the value of goods and services produced and consumed by the Africans themselves. The remaining £111 million was cash income freely expendable, showing an increase of £50 million by comparison with 1954.

The bulk of African purchasing power is concentrated in the main industrial towns and mining centres. The market in the rural areas, which at present is very small, will slowly increase: the Governments concerned are pursuing policies designed to lift the rural economy above subsistence level.

The African is in general a discriminating buyer and will, if he can afford it, pay a surprisingly high price for a good quality product. He is becoming increasingly wedded to European styles and fashions, and is readily responsive to well conceived and directed sales promotion campaigns.

An already valuable market for a wide range of consumer goods and consumer durables must be expected to expand steadily with a growing emphasis on the latter as African housing and living standards improve.

Statistical information appears in the form of appendices to which references are made in the text.

The Country

The area of the Federation of Rhodesia and Nyasaland is nearly 500,000 square miles, larger than the Republic of South Africa and larger than all Western Europe apart from Scandinavia and the British Isles. The territory lies completely within the tropics; but most of it consists of plateaux between 3,000 and 5,000 feet above sea level.

The altitude gives a large part of the Federation a temperate climate where people of European origin can live permanently: shade temperatures on the plateaux rarely exceed 90° F. Rainfall is seasonal, mostly falling between November and April.

The territory contains two very large lakes, Lake Nyasa which is about 350 miles long and Lake Kariba which will eventually be nearly 200 miles in length, and a major river, the Zambezi, which divides Northern and Southern Rhodesia. The three territories are landlocked; and external trade relies on communications through the Republic of South Africa, Mozambique and to a lesser extent Angola.

The Administration

In 1953 the three territories of Southern Rhodesia, Northern Rhodesia and Nyasaland were formed into the Federation of Rhodesia and Nyasaland, the Federal Government becoming responsible for external affairs, defence, immigration, the generation and bulk distribution of electrical energy, inter-territorial roads, railways and shipping, civil aviation, ports and telecommunications, European agriculture and education, health and, in the fields of commerce and industry, predominantly for financial and economic

There are many light industries, such as the manufacture of copper articles (Rhodesian Copper Products Ltd., Salisbury).

policy including the Federal Customs Tariff and the collection of the major revenues. The Territorial Governments retain control of African administration, African agriculture, African education, mining, territorial roads, labour matters, land holding, police and local government; and they have the right to levy certain taxes.

The institution of a common customs tariff has led to the development of Salisbury and Bulawayo as the main commercial and distributional centres of the federated territories.

The Population

In 1900 the African population of Southern Rhodesia was estimated at nearly 500,000 and at roughly the same figure in Northern Rhodesia. No figures are available for Nyasaland at that date.

Today the African population of the Federation totals about 8,300,000 distributed more or less equally among the three territories. A more detailed breakdown of population by races as at June 30, 1961 is given in Appendix A. This compares with a present European population of about 300,000.

Rate of Increase in Population

By a projection based on the natural rate of increase over the last 10 years, it has been estimated that the African population will

by 1970 have risen to 10,300,000, and to about 21,500,000 by the end of the century. Similar computations suggest that the European population could increase to 2,500,000 by the end of the century. The growth of the African population is likely to depend on natural increase alone: there is relatively very little African immigration.

Distribution of African Population

Of the 8 million Africans in the Federation, it is estimated that only 11.3 per cent. live in the 19 principal towns. The remainder live in the rural areas, predominantly in kraals (villages), and continue in their traditional way of life based on subsistence farming. A table showing the African population of the major towns is given in Appendix B.

Economic Advancement of the African

It is the settled policy of the governments concerned to secure a progressively improving standard of living for Africans throughout the federal territories, to lift the rural African above the level of subsistence farming, and to generate more cash income in the hands of Africans in the money economy where already, in the urban areas, many Africans are earning salaries which enable them to buy a wide range of manufactured goods.

The problem which far outstrips all others in importance, and intractability, is that of generating on any adequate scale opportunities for Africans to secure gainful employment. The authorities fully recognize that only the development of African agriculture and its promotion to the level of the cash economy can do this. Nevertheless, while the territorial and federal governments are pressing forward with plans and projects in the agricultural sector, they keep well in mind the lesser but by no means insignificant potentialities of the industrial sector to provide work for unemployed and under-employed Africans; and those who may be ready to establish new industrial enterprises in these territories are assured of the full co-operation of government.

The Northern Rhodesian Government is convinced that the best prospects for improving African earning power lie with the injection of a great part of the government's available finance into schemes for agricultural development which might be expected to reverse the drift from the land into urban areas where underemployment is already extensive. In 1960, the marketable produce of African agriculture in Northern Rhodesia was valued at £1.8 million, mostly deriving from sales of maize; and there is much scope for improvement.

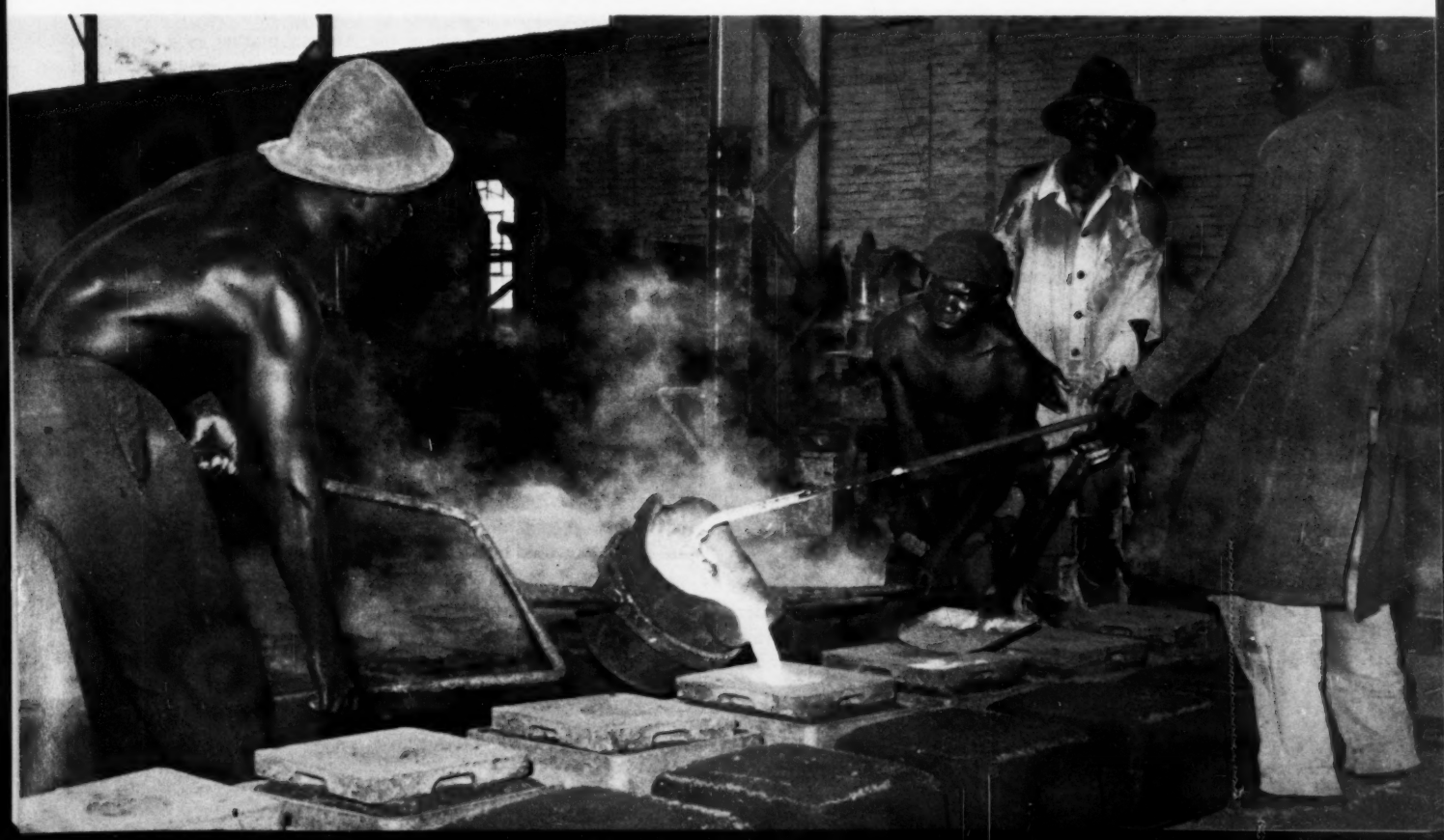
The cash income of agriculturalists in Southern Rhodesia has grown appreciably in recent years and is likely to continue to do so as a result of continuing governmental aid and financial assistance from non-official sources (part of which will be used also in Northern Rhodesia).

Between 1947 and 1960 the African harvest of marketable maize increased from 932,500 bags to 2,335,725; groundnuts from 196,600 bags to 570,776; cotton from 75,443 lb. to 267,227 lb.; and tobacco from zero to 618,016 lb. Organized sales of African owned cattle have nearly doubled in the past ten years; and expenditure through the native Production and Marketing Development Fund applied to the production of African agriculture increased from £143,662 in 1949 to approximately £2,550,000 in 1960.

Literacy

The great majority of the African population is illiterate, notwithstanding the devotion of an appreciable part of governmental

African factory workers pouring molten cast-iron into standard sand moulds (Raine Engineering Works, Ndola).



revenues to education (in Southern Rhodesia alone about 20 per cent. of the total budget). Nevertheless, the spread of literacy is making rapid progress; and more Africans are securing employment on the railways, in the civil service, in the armed forces, at the mines and throughout industry, where literacy is a necessary qualification. Africans are slowly but surely rising into the higher income brackets: their purchasing power is enhanced and with it their desire for more and better quality consumer goods which go naturally with a higher standard of living.

African Purchasing Power

The total value of African wages in 1960 was approximately £96 million. Although this means an annual average rate of only £87 *per capita*, it represents an increase of 7 per cent. over 1954 or nearly double the rate of increase for European earnings.

To the figure of £96 million received as wages and salaries by Africans must be added £15 million representing the value of the disposable product of self-employed Africans, an increase of 67 per cent. by comparison with the level of similar earnings in 1954: in total roughly £111 million in the "cash economy" available for purchases by the African population in 1960. There is evidence that after deductions have been made for food and subsistence maintenance a considerable amount was spent on other consumer goods. In the rural and largely "subsistence economy" the value of goods produced and consumed in 1960 is estimated at £85 million.

Before examining the types of products which those Africans within the "cash economy" might be expected to buy with the £111 million cash at their disposal, we must consider what this figure means in terms of absolute wealth to the individual. The Africans in the Federation fall very broadly into three groups: (a) the 6 to 7 million Africans living in the rural areas largely on a subsistence economy; (b) the urban Africans engaged either in Government employment, commerce and industry or domestic service, or self-employed; and (c) the 40,000 employed by the copper companies of Northern Rhodesia who enjoy far higher pay and better living conditions than Africans enjoy in any other industry.

The Rural African

In Southern Rhodesia some 2,210,000 Africans live in the native areas including 360,000 African farmers who may be said to have entered the cash economy. In 1960, the value of the cash crops was estimated, on a producer price basis, at £4 million and that of subsistence crops £8.5 million. Cash purchases are largely confined to food, bedding and clothing; and price is a primary consideration. There is, however, a market for certain consumer durables such as radio sets; and a surprising number of motor vehicles, usually secondhand, are in use.

In Northern Rhodesia it was estimated that in 1960 some 2 million Africans lived in the rural areas of whom about 400,000 produced a marketable surplus valued at £1.8 million. A number of improved African farmers are understood to realize between £150-£200 per annum and so have the means to purchase more advanced kinds of equipment. The product of subsistence farming and fishing was estimated at £21 million. As in Southern Rhodesia consumer purchases in the rural areas will continue to be confined mainly to food, clothing and bedding.

In Nyasaland the African population is estimated at 2,800,000. A small proportion finds work in the tea, coffee, and other estates; and some 50,000 are employed in urban areas. Mines in Southern Rhodesia and the Transvaal have employed about 160,000 Nyasas who sent some of their earnings home. The pattern of consumer purchases follows that of the Rhodesias but at a more modest level.

The Urban African

In 1960 1,100,000 African work people were recorded as gainfully employed in the three territories. Of these, 375,000 were employed on farms at an average wage of about £4 per month, 155,000 in domestic service at £5-£8 per month and 94,000 in mines and quarries at £14-£35 per month. Other industries, almost wholly urban, absorbed some 473,000 with average cash earnings of about £9 per month, per head. The concentration of African purchasing power is to be seen in the towns and is at its peak in those of the copper belt where half of those employed in the extractive industries work.

Demographical surveys covering the four main towns of Southern Rhodesia were carried out in 1958 and 1959 and of the eight main towns of Northern Rhodesia in 1960. Summaries of the findings appear at Appendices D and E which provide an indication of the spending power of individuals and groups of Africans employed in the areas surveyed. Appendix F shows the spread of occupations in Nyasaland where minimum wages were fixed in 1961 at between 3s. and 1s. 8d. per day.

Domestic servants form a sizeable group within the total of Africans in gainful employment. With a cash income of £5-£8 per month it is considered the 390,000 domestics in the four main towns alone of Southern Rhodesia may well, after maintaining their dependents, themselves spend some £3-£4 million annually on a wide range of consumer goods; but far less will be spent in this way in Northern Rhodesia, and very little indeed in Nyasaland.

Africans on the Copperbelt

At the end of December 1960 there were 41,000 Africans employed on the copper mines and at the zinc and lead mines at Broken Hill. This employment group represents the highest paid group of African employees in the Federation; and, because it is largely concentrated in an area 60 miles by 30 miles, it necessarily forms a special feature within the African market as a whole. In 1960 the Africans in these towns received a gross cash income of £19½ million; and after deductions for rent they were left with £17,043,000. Of this just under £16 million was spent in the immediate urban areas. An annual bonus usually described as the 'Copper Bonus' is declared about June 30 and paid at the end of August. In 1960 the bonus was 46 per cent. of basic pay of which 10 per cent. was retained as savings against the taking of leave and 5 per cent. for payment at Christmas time.

Exporters and manufacturers who wish to do business in the African market on the Copperbelt should ensure that their goods are available to the Copperbelt retail outlets by the end of August, since at this time the African work-people on the Copperbelt spend the substantial funds at their command on expensive clothes, bicycles, radios, imported canned foodstuffs and a wide variety of household durables and appliances. Sizeable amounts are spent on household furnishings; and, with the opening of the Kitwe television transmitter at the end of 1961, the disbursement of this year's "Copper Bonus" was expected sharply to stimulate sales of television sets. A reliable T.V. receiver retailing at about £50, were that possible, would be bound to excite very keen interest.

There is little doubt that, if and when the mine companies commence to install power circuits into the houses on their townships (and they are now moving in this direction) a very large market for all types of electrical domestic apparatus will materialize.

THE AFRICAN AS A BUYER

The African town dweller tends readily to adopt European tastes and fashions probably because he has no background of old-established indigenous culture and therefore no standards to impel him in any other direction. The factors which dictate the buying preferences of Africans are not always readily to be appreciated by the European and are often quite different from those which might motivate him.

The urban African has a keen appreciation of the value of money and is a very discriminating buyer of those articles of which he has by experience acquired a sound knowledge, e.g., clothing and hardware. When faced with articles with which he is not so familiar, such as radios, electrical apparatus and druggist sundries, he is impressed by good presentation. Considerations of personal prestige can and often do exert a powerful influence.

While the African tends to conform with the European taste he does not like articles which give the impression that they have been specially made for him: for instance, he selects and wears as nearly as possible the same clothes, hats and shoes as the European. Official surveys of African expenditure have been made in certain of the major towns of Southern and Northern Rhodesia; and summaries of the findings appear in Appendices G and H.

Figures in Appendix G show that approximately 46 per cent. of the expenditure of urban Africans in the four main towns (i.e., Salisbury, Bulawayo, Umtali and Gwelo) was spent on food. Clothing and footwear accounted for 17.2 per cent.; drink and tobacco 10 per cent.; household stores 5.8 per cent.; fuel and light 3.2 per cent.; and 3.2 per cent. of total expenditure represented money sent to rural areas. Apart from emoluments received in cash most of the Africans surveyed enjoyed also a considerable income in kind when this survey was undertaken, e.g., rent-free accommodation or rent allowance, free uniforms or protective clothing, free ration of mealie meal or meals at work, and often tea, jam, bread and soap.

The Central Statistical Office Budget Survey teams also made an attempt to assess the changes in annual expenditure which would follow a hypothetical increase in incomes of £1 a month. The resulting conclusions are of considerable practical interest because they help to throw light on the way in which the African will spend his money when increases in wages take place (they are in fact now increasing). The actual percentage of total income sent to the rural areas was found to be 3.2 per cent.; but it was estimated that, given the hypothetical increase, the amount sent to rural areas would rise by 34 per cent. to some £673,000 and that expenditure on petrol, oil and auto repairs would increase by 50 per cent., on doctors', herbalists' fees and medicines by 30.3 per cent., on fares and travelling by 25.5 per cent., on clothing and footwear by 18 per cent. and on household stores by 16.5 per cent. Expenditure of foodstuffs although greater in absolute terms would, it was thought, increase by only 9 per cent. These estimates suggest that an increase of £1 per month would create a demand for manufactured commodities rather than consumable items, apart from food, to an extent of about £630,000 in the four main towns.

Comparable figures resulting from the urban budget surveys in Northern Rhodesia are given in Appendix H. These show roughly how much money the Africans spent on various purchases; but taken together they suggest that in the major urban centres they spent about £6 million on manufactured goods excluding food and beverages. These surveys point to the existence of a substantial latent demand for consumer goods and the classification of goods through which this will become manifested as progressive increases in cash incomes occur.

As a very rough guide it can be taken that the African in the towns spends about 45 per cent. of his earnings on foodstuffs. About 10 per cent. is spent on drinks and tobacco, 17 per cent. on clothing and on footwear, 6 per cent. on household stores and the remainder on other items. As the Africans' wages increase the amount spent on foodstuffs tends to level off while that on clothing, household stores and transport facilities increases; and this perhaps can be taken as the rough order of priority likely to be accorded by Africans to their requirements of these various commodities and services. By visits to the African townships, to African homes on the Copperbelt, mining townships, to the wholesalers and distributing agents who maintain sales analyses of their transactions in the African market and by personal observation of African tastes, it is possible to forecast with some confidence the general way in which purchases will develop in the coming decade.

The paragraphs which follow, and the statistical summary for selected goods which appears at Appendix I, provide together a representative picture of goods commonly sold to the African. This Appendix indicates how urban Africans' tastes for particular goods are developing on European lines, and how the two markets are merging and distinctions becoming blurred. Whilst, for example, in India a soft felt hat makes no appeal to an Indian, to the African it is a mark of distinction; and some will cheerfully spend £5 at least on the best British branded article. The African tends to buy the best article within the limits of his means. Certain firms, which concentrate the major part of their effort selling to the African, have described their activities as an adventure and experiment in the sense that they are continually offering new or different lines of goods to their African customers in attempts to widen the market in which tradition plays little part and where novelty, objectivity and enterprise, coupled always with quality, are the keys to successful sales promotion and effective stimulants to demand.

Food

The principal diet of Africans except in those areas which are near the great lakes is mealie meal (ground maize). Expenditure on mealie meal by Africans even in the rural areas usually represents about 25 per cent. of their expenditure on food. Meat and fish are about equally important elements in the diet; and in towns such as Salisbury and Bulawayo, which are far removed from fishing grounds, there is a demand for tinned and dried fish. In the towns the consumption of milk is growing; and Africans are being encouraged officially to drink fresh milk as a means of correcting deficiencies of vitamins and minerals in the habitual diet and so improving the general standard of health. It has been said that, if Africans were to drink as much milk as Europeans, industrial and other production and output could be very greatly increased.

A problem arises when attempting to vary the ordinary African diet in that very few Africans enjoy facilities for keeping fresh food in good condition on any basis other than that of day-to-day purchases. On the Copperbelt and in the large towns where Africans can afford to vary their diet beyond the traditional sadza (a porridge made from mealie meal) they must, because few if any own refrigerators, buy tinned or similarly preserved foods. In most food stores which cater for Africans in that area the shelves are well stocked with tinned fish, tinned meats, tinned jams, tinned vegetables, tinned condensed milk, tinned powdered milk and even tinned sausages – the latter being even for the European something of a luxury. The African likes strong tasting foods such as tinned fish in a strongly flavoured tomato sauce or in a hot piri-piri sauce. Such lines move faster from the retailer's shelves than, for

example, fish in oil which is too mild in flavour. Most Africans like sweet foods: golden syrup has always been an excellent seller. Jam, often eaten with a spoon, is very popular. Apricot jam is much favoured, probably because it has a more characteristic taste than other fruit. Africans make considerable purchases of tinned vegetables, often of high quality; but here buying by African women appears often to be undiscriminating. Tinned vegetables provide an instance of a market ripe for development and promotion. Tea and coffee are good selling lines with the former much the more important: local growers of tea have captured most of the market though it has by no means been fully exploited.

Before leaving the question of foodstuffs it is worth mentioning that there is a considerable sale of food and milk in small tins (2-2¾ oz.). There are good openings for the sale (retail) of a sixpenny line: African shopkeepers like to have commodities on their shelves which can be priced in round figures in order to avoid giving change. This is true of all stocks in the African shops; and one constantly hears the customer ask for a 6d., 9d. or 1s. 6d. tin rather than for a tin of 2oz., 6oz., 12oz. or 1lb. weight. This custom is principally a reflection of a buying habit which is still found in the African markets for consumable produce where, instead of the price of vegetables varying according to whether supply is short or abundant, the amount available for 3d., 6d. or 1s. is reduced or increased in weight or number by the hawker. Finally, and in contrast to this demand for a small tin of what might as yet perhaps be something of a luxury to the African, there is a demand for large tins of up to 5lb. weight of skimmed milk etc.: the intrinsic value of the tin with its tight-fitting lid is high in domestic conditions where attacks by insects upon stored food presents a constant problem. Some manufacturers who have changed their pack from a heavy tin to an attractive light-weight plastic bag have found that the demand for the product has fallen off in spite of an appreciable reduction in the selling price of the filled pack.

Drink and Tobacco

Many Africans are enthusiastic customers of the brewing industry. (It is often argued that any increase in wages paid to Africans would be spent on beer, but this is not strictly true.) The profits made on the municipally-owned beer halls yield considerable funds which are devoted to the improvement of amenities in the African townships; and in Northern Rhodesia, where the brewing of native beer is carried on by a private contractor, very large profits have been secured. Municipal and mining township officials consider that the proportion of expenditure on beer tends to drop as wages increase beyond the average rates paid to urban workers. The 'Beer Drink', to an African has always been his traditional occasion for a social gathering; and this is a contributory underlying cause of his spending about 16 per cent. of his total income on drink along with tobacco. The local production of beer and cigarettes can cater adequately for the African demand for both commodities; but there is a growing African preference in the urban areas for the kind of beer which local breweries produce for European consumption.

Clothing

It is in the field of clothing and footwear that the most notable increases in African spending are occurring at the present time. In remote areas of the bush there are Africans still wearing loin cloths, beads and even skins, but it is very rarely that African men, women or children are seen in any of the main towns of the Rhodesias wearing anything other than European dress (with, however, colour combinations which do not necessarily reflect European tastes). In Nyasaland things are rather different, for the traditional dress of the women remains at present a blouse and a length of cloth wrapped around the waist. While imports of clothing in general have in recent years tended to fall away, the decrease has been far more than made good by an increase in the output from indigenous clothing and footwear factories, a sure pointer to the marked increase which has taken place in the purchasing power of the African population. It would seem that the local manufacture of knitwear has lagged behind demand since there has been a significant increase in imports of jerseys and pullovers, which are important items in African clothing. It is a safe conclusion that there must at present be a good opportunity here for manufacturers of cheap but good knitwear (see import statistics in Appendix I).

The market for clothing in Nyasaland is as yet unsophisticated and in general has not risen much above subsistence level requirements, though improvement will come in time. Here the 'Konde' tailor is seen everywhere sitting on the verandahs of small stores in the towns making clothes to customer's requirements. Elsewhere urban Africans either make their own clothes with sewing machines (it is estimated that 80 per cent. of hand sewing machines sold in the Federation are bought by Africans) or buy ready-made clothing, usually the lower qualities, in country shops and stores. Those Africans earning good wages on the Copperbelt not unusually own two or three suits costing some £15-£20 each and possess up to ten shirts mostly of a sober pale blue or green or plain white. The well-dressed African will take great care of his quite expensive wardrobe, the contents of which are invariably expertly pressed and cleaned for wear at weekends. For the rest of the week he tends to wear more brightly coloured shirts than would normally sell to the Europeans; but the more affluent he becomes the more he swings over to typical European tastes. Agents handling top quality lines of shirts, socks, shoes and trousers imported from overseas are finding that their sales to European owned shops are increasing steadily. The reason for this can only be (and this contention is often supported by outfitters) the increasing purchases of good quality clothes by Africans. Many local manufacturers are themselves fully aware of this trend. They are concentrating on the production of articles of good quality and are establishing their reputation and, very importantly, their brand names in the minds of African purchasers.

African women are also very dress conscious; and competitions held by textile manufacturers to select the best dressed of them are very popular. They are also beginning to adopt European fashions in underwear; but there is as yet no very great demand for foundation garments or for stockings. A market where there appears to be great opportunities is that for cheap but attractive children's wear, for the rapid increase in the African birth rate is generating a high level of demand. In the towns African children are invariably well dressed in drill shorts and shirts or European-style children's dresses. In the very near future there should be an excellent market in the African urban areas, and especially in the mining townships, for teenage wear. Africans are extremely fond of their children and will often spend a disproportionate amount of money on attractive clothing for them. Some idea of the price paid for purchases of clothing by Africans may be of use to manufacturers; and in Appendix J details are given of the result of the findings of urban budget surveys undertaken in the main towns of Northern Rhodesia as recently as 1960.

Bedding

An adequate supply of blankets constitutes a 'must' in every African household. Most Africans possess at least two blankets,

General view of an assembly line (Chassay Bros. (PVT.) Ltd., Bulawayo).

for they are very sensitive to the change in temperature when the cool weather sets in during the winter months of July and August. There are several local manufacturers of blankets with wide experience of supplying the African market; and they are beginning to find that demand for a better quality article is increasing. The African is developing a taste for coloured blankets, sometimes in pastel shades although the multi-coloured variety, familiar throughout the African townships, still sells in great quantities. There is virtually no demand for white blankets. The popular prices for blankets range from 7s. 9d. for a cotton grey blanket of size 54″ x 80″ to 23/26 shillings for a bound coloured blanket in a plain pastel shade of size 60″ x 80″. Some Africans earning high wages will pay up to 37s. 6d. for a good quality satin bound blanket; and this is yet another field where Africans are quick to recognize quality when they have sufficient cash available to indulge their appreciation of it.

They also buy sheets, usually of a good quality cotton, and will pay as much as £3/£5 per pair for those carrying a well-known brand name. Near the mining townships of the Copperbelt some shops maintain stocks of well-known brands of English sheets of the most expensive varieties for sale to African customers. Plain white is the most popular. An African rates a bed and a good mattress as a very important part of his possessions; and local manufacturers are for the most part able to meet this demand. Mattresses often have a short life on account of atmospheric humidity and their attractions for the insect world.

It may be well worth investigating the market for a plastic covered sponge rubber type of mattress which is washable and easily rolled up for carrying; but the price would need to be kept down to levels within reach of the African's pocket.

Piece-goods

Trade in textile piece-goods is of course the 'African trade' *par excellence*. The demand for textiles has been well explored and catered for by British manufacturers; and Britain still supplies by far the largest share of the cotton piece-goods imported into the Federation, although ground has been lost in the rayon piece-goods market. Cotton is generally more popular than rayon; and there is a brisk market in khaki drill which is bought for the manufacture of shirts and shorts. Most of the demand is met from local sources; but there is some market for imports of the best quality drill.

In the Rhodesias a definite swing towards the purchase of made-up clothing has emerged; but in Nyasaland people still prefer to buy cloth and make their own clothes. There, deep bright colours with bold prints are most popular and sell well if within a price range of 16d. to 28d. per yard c.i.f. Blue print is still a staple requirement in Nyasaland although demand has almost died out in the rest of the Federation. One of the wholesalers in Nyasaland pointed out recently that cloths should be of 32″ width as this is the most suitable measurement when wrapped round the waist, as they are worn by the women. Practically all the textile piece-goods for the African market pass through the hands of the wholesale merchants whose activities will be discussed in the next section of this report. The changing fashions among Africans as these may apply to textile piece-goods are too complicated to be discussed in any detail in this report; but agents and wholesalers who make any pretence of a serious interest in the trade in the Rhodesias keep in touch and are well informed about trends in fashion. The piece-goods trade is highly competitive and price conscious. It forms an important block in the list of Federal imports. If an African woman wishes to wear the more expensive varieties of cotton clothing, she will usually buy a ready-made dress rather than more expensive cloth for home making up.

Household Goods

The typical home of the better-off African copper miner comprises three rooms and a kitchenette and is owned by the municipality or by his employer. A measure of sophistication is already reflected in the household equipment. There is a steady demand for 3-piece lounge suites of the heavier variety which are normally made locally and retail at about £25. In many of the sitting-rooms a good quality carpet will be seen on the floor or failing that there will be linoleum and mats. Africans in the mining township mostly purchase linoleum by the piece (4 yards x 3 yards) already cut to size by the retailer who is aware of the dimensions of the houses. Curtains hang at most of the windows; and Africans are said to be conservative in their taste for furnishings. One of the large departmental stores in Salisbury reports that Africans are among the buyers of the most expensive furnishing materials. This is a further illustration of the way in which Africans will spend money on quality goods whenever they can afford to do so. In the bedroom one finds a cupboard or a large wardrobe often purchased second-hand from a European source. There is usually a candlewick bedspread which is very popular among Africans who can afford them.

For the dining room, the African likes to have a tea-set for six persons; and this also applies to cutlery. Africans who can afford china and cutlery follow European tastes; but there is a preference for knives with bone handles which are thought to be genuine ivory, rather than for the one-piece metal knife. All households will possess enamel saucepans, washing bowls, mugs and plates and an enamel teapot; and local manufacturers for the most part satisfy these demands.

Few African houses are connected to electric mains supply: where installed it is usually restricted to a single light point in the ceilings of the principal rooms. Consequently electric stoves, refrigerators, electric kettles, etc., are bought by only very few Africans but many would do so readily if power were available. The municipalities and leading mining companies are giving consideration to the provision of power points in the houses provided for African tenants. A serious obstacle is that the African occupiers are so accustomed to enjoy electricity for lighting free of charge that there is a psychological difficulty in persauding them that more extensive use of electrical power should not also be made available without payment for it. Moreover the expense of installing cut-out meters would be heavy. It can only be a matter of time, however, before the better-paid and housed African will be able to enjoy an extension of these amenities; and this will usher in a new big demand for a very wide range of domestic electrical equipment. Manufacturers should be on the alert for the installation in the not very distant future of power supplies in the African townships.

Bicycles

To the African the possession of a bicycle is something of a necessity. He is greatly dependent on it for transport in most areas. He is very sensitive indeed to quality and has few inhibitions about paying for it. Figures in Appendix I 17 show that Britain is deeply entrenched in this market. Sports models and tourist cycles account for a small proportion of the total number sold; and the overwhelming demand is for the roadster style with orthodox frame and straight handlebars. The African is thoroughly familiar with well-known British brand names and is very reluctant to accept a brand unknown to him. The field in which Britain encounters serious and growing competition is that for spare parts, components and accessories for the cycle. Neither the customer (through ignorance) nor the trader insist on the replacement of damaged parts by proprietary spares; and pedals, saddles and other spares commonly needed for replacement purposes are imported in considerable quantities from Continental sources. There is severe competition to secure a share of the cycle spares market and, at the lower end of the trade, a constant switching by traders when placing their orders between German, Czechoslovakian, French and Italian sources of supply. It is illuminating to see what a variety of accessories many Africans choose to fit to their machines: 3-speed gears, complicated lighting sets, luggage carriers, braking systems, warning devices, stands and especially security devices are very popular, and Africans in the big towns are not infrequently seen on bicycles fitted with a special bracket to carry a portable transistor radio.

Radios, Record Players and Television Sets

Unfortunately there are no accurate figures available to show the number of radio sets in the hands of Africans; but it is believed that 80 per cent. of all urban African households possess a radio. The Federal Broadcasting Corporation estimated at the beginning of last year that there were over 600,000 radio sets owned by Africans in the Federation. In recent years the transistor radio set has become increasingly popular because, although the initial outlay (£13-£15) is greater, the cost of replacement batteries is so very much lower than that for those for other battery sets. There must be many sets in African hands lying idle because the owner cannot for the time being conveniently afford the cost of buying a new dry cell battery of the large sort.

In most cases the demand for radios among Africans is met by two Bulawayo companies producing portable and table transistor radios. On the Copperbelt and in other places where Africans can afford to buy them radiograms are very popular. They are of course 'status symbols' in African houses; and a locally produced battery operated radiogram complete with a 4-speed record player and storage room for records is said to be a good seller on the Copperbelt at a retail price of £39 15s.

A gramophone, too, is a popular purchase among Africans; and there is an excellent market for portable models selling at a price of £8-£10. As is well known the African enjoys dancing: well over half the discs he buys are to reproduce his own music recorded either locally or in the Republic of South Africa. Television sets are at the moment beyond the pocket of most Africans; but traders on the Copperbelt consider that, if a cheap television set retailing under £60 could be made available at the time of the annual payment of the copper bonus at the end of August, it would attract a great deal of African custom. Television sets are installed in most African recreation halls as an amenity, and in beer halls, and are very popular.

Cosmetics and Druggist Sundries

Africans are big purchasers of most types of druggist sundries. The African is a great believer in patent medicines and enjoys buying those of supposedly quick healing or curing properties. It is a common sight in the rural areas to see large display advertisements of the human body with arrows pointing from the location of the pain centres to the number of the cure which can be purchased inside the shop to quell it. The Africans place great faith in pills and consider that a brightly coloured blue or green pill is much more effective than a plain white one. Embrocations and liniments are very popular; and the humblest retail stores often display a full array of those brands of embrocations which are household words in Britain. If a change of styling were to be made in the labels or bottle shapes of well-known brands, Africans would probably cease to buy them. Laxatives of all kinds are generously consumed and are usually taken in far stronger doses than could ordinarily be tolerated by the average European.

The Africans are eager buyers of soaps; while formerly they could afford to buy only the cheapest unbranded blue or yellow bars with a fatty-acid content of 45 per cent., they are now turning increasingly to good quality branded soaps even for the washing of clothes. Clever advertising and promotional campaigns by large indigenous soap manufacturers have greatly promoted sales of brands found in all European shops. The African likes a strongly perfumed soap and follows European tastes for coloured tablets. Hair cream is very popular especially if a well-known brand, while face creams of all kinds enjoy good sales among men as well as women. It is estimated that at least 95 per cent. of vanishing cream sold is bought by Africans. The African is very keen to acquire a light complexion; and skin lighteners costing as much as 7s. or 8s. a tube attract good custom in the urban areas. Petroleum jelly is extremely popular both as a body rub to make the skin soft, supple and shining, and as a hair grease. Talcum and face powders and deodorants are becoming more widely used. Toothpaste is not a very fast seller: the African in general does not suffer from caries to the same extent as the European. Although razor blades sell well, few Africans possess a razor but manage with the blade held between the thumb and forefinger.

African women are as susceptible to advertising appeals to feminine vanity as their European counterparts; and they are increasingly acquiring the taste for all types of cheaper toilet preparations (they will in time turn to the more costly varieties). They have little use for lipstick but, as with the men, are very sensitive concerning the colour and texture of their skins. Cleansing creams, powder bases and powder are widely used to achieve a lighter complexion. It is wrong to imagine that *any* cheap cosmetic will appeal to the Africans – sales must be pressed home by an active selling organization and clever, well-directed advertising, and the product should be generally available in European shops and not be, nor be suspected to be, especially made for Africans.

Jewellery and Fancy Goods

There is a good demand for all types of jewellery and novelty goods of the type normally found in bazaar stores. An African cannot afford to purchase expensive jewellery but is a great lover of gilt tie-pins, ear-rings, necklaces, imitation pearls, etc. Sales of these commodities are best channelled through the bazaar type stores which can afford to stock a greater variety of choice for examination by the African customer. Novelty goods of all kinds sell well: for example, wallets containing many partitions are very popular especially if there is a place for a photograph of the holder or his favourite film star.

Books

The level of education is rising and more people are able to read; but the educated African finds it extremely difficult to find simple novels which he can understand. Stories written specially for African magazines are therefore very popular. Novels printed in the vernacular sell well; but there is considerable scope for stories and novels produced in English for reading by African adults. Such stories would require to be written with a local background and their themes 'African orientated' or they would not be understood. To most Africans in Central Africa references to oceans, liners, large Western cities and the way of life in other continents which they have never seen naturally convey very little. There is probably an excellent opportunity to sell primers in English for adults who are interested enough to study the language, because English is the accepted medium of the aspiring African who realizes that he cannot really hope to improve his position in society unless he is able to read and write English with some facility. Today in Southern Rhodesia something like 60 per cent. of the African population has a measure of command of that language.

Hem stitching in the blanket department at the Rhodesian Weaving Mills, Bulawayo.

Weaving towelling at the Umtali factory of the Textile Mills (1947) Holdings Ltd.

Toys

The African parent is no less ready than parents the world over to spend money on children; and those who can afford to do so purchase European-style toys for their youngsters. There is no need to create special toys for African children; and in any case the African parent prefers to see his children playing with the same toys as those ordinarily provided for the European child.

Cars

Africans are now entering the market for motor cars. This form of transport, a necessity for all Europeans living in a country where public transport is inadequate, is becoming a 'status symbol' among Africans. On the Copperbelt and in government service, Africans not uncommonly own cars bought second-hand; they are only just beginning to feel their way into the market for new cars in the smaller sizes. What they seek is a vehicle of tough construction to stand up to African country conditions, and roads, without requiring frequent maintenance.

Consumer Goods in General

The three territories present a valuable market with great potential. Many British exporters will find that it will repay steady and above all 'on the spot' investigation followed by periodical re-appraisal at intervals of say 12 to 18 months. As incomes continue to rise the demand from the Africans will increasingly coincide with that from the European.

Local Manufacturing Industry and its Influence on Imports

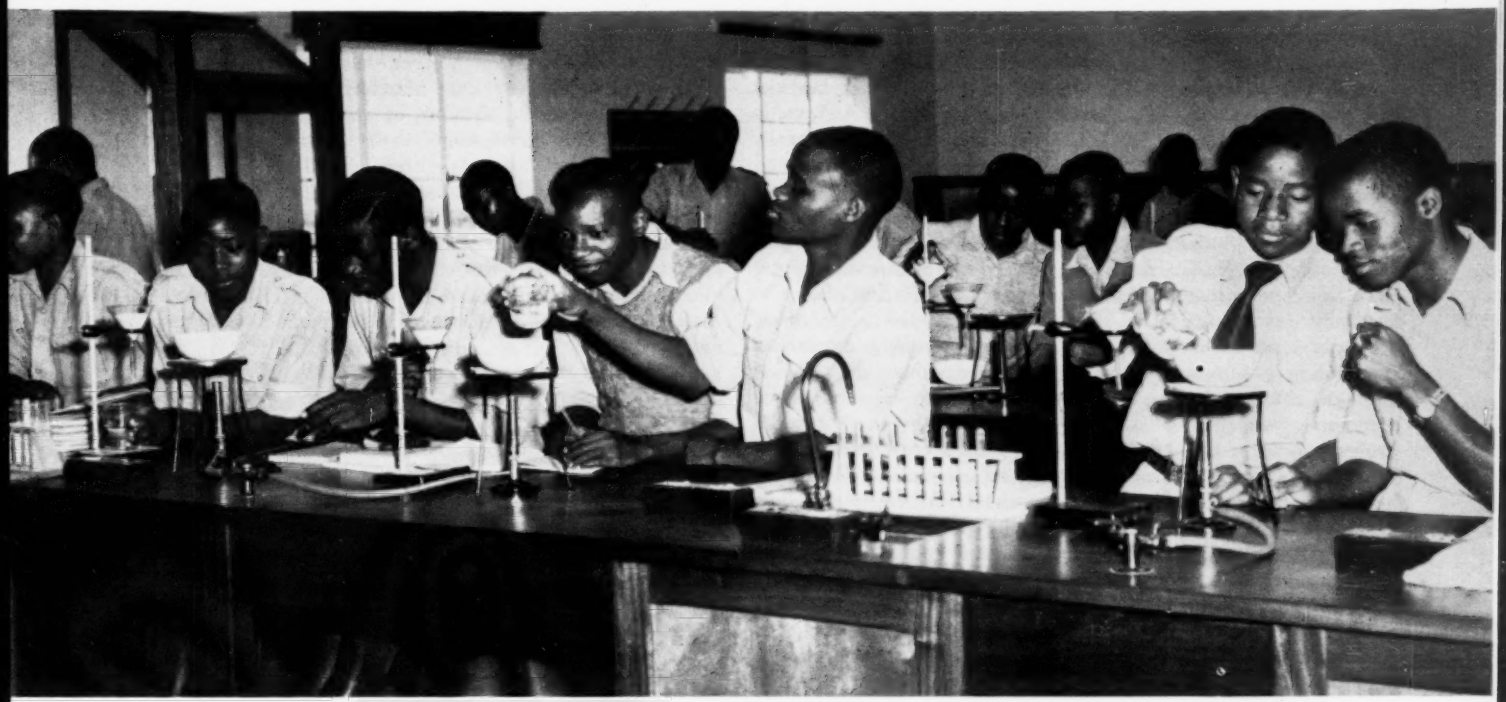
While the economy of the Federation is based on the twin pillars of copper and tobacco, the value of production of manufacturing industry in 1960 was over £57,000,000 – more than double the figure for 1954. Domestic industry now accounts for 10·3 per cent. of the gross national product.

The most recently published census of production does not go beyond 1959. Nevertheless it reveals the rapid growth in the production of locally made consumer goods by indigenous industries which ordinarily supply consumer goods for the African as well as the European market. There have been marked increases in the number of individual establishments and in the value of their aggregate output of dairy and bakery products, drink, wearing apparel and footwear, furniture and fixtures, soaps and candles, chemicals and chemical products (see table in Appendix K). Local industry caters fairly extensively for a large part of the demand for the more elementary and technically less complicated requirements of the African population; but a demand and a taste for more sophisticated products is growing among the Africans in the towns. British manufacturers should find opportunities in this field.

Imports

Import statistics for 1960 show that South Africa supplied goods to the value of £52,209,000. Britain was a close second with £51,731,000. The Federal Republic of Germany third with only £6,415,000. After the revision of the South African Trade Agreement in July 1960, the South African share of the market has declined; and the most recent figures show that Britain and South Africa now supply 33·75 per cent. and 30·86 per cent respectively.

The proximity of South Africa to the Federation results in much lower carrying charges and this, combined with the absence of dock dues and shipping costs, goes a long way to make delivery possible at a lower price and an earlier date. Merchants and retailers naturally do not wish to have large sums of money tied up in goods on the water if they can avoid it, so that to be able to order in smaller quantities and to secure quick delivery from factories in South



A practical lesson in the chemistry laboratory at the Fletcher High School, Gwelo.

Africa exerts a powerful influence on the source of supply, other things being more or less equal.

South African manufacturers also have the benefit of direct experience in their own native market in matters of fashion, packaging, product appeal, choice and sales promotional advertising methods; and they can visit their customers in the Federation with comparative ease and cultivate personally a closer working arrangement with their agents. British exporters would be well advised to pay more visits to these territories. Agents frequently complain that they do not receive regular visits from their principals; and, as they themselves can seldom afford the time and the cost involved in making trips to Britain, they tend to feel some difficulty in keeping their principals up to date. In some matters personal discussion is much more effective than the writing of letters.

At the present time Rhodesian importers are particularly sensitive to anything which may suggest that Britain is neglectful of their requirements. There may, for example, be good reasons why delivery dates cannot be met; but the Rhodesian agent should be informed of them before his customer rings him up to complain of non-delivery or failure to comply with forwarding instructions. Firms who not only do not meet delivery promises but fail to warn their agents do not help the reputation of the British manufacturer in general. British manufacturers, however, who take an objective view of the advice of their local representatives and are keen to develop their market should usually find themselves able at least to match, if not to better, South African competition since they are frequently favoured by the Federal tariff and usually their manufacturing methods and techniques are in advance of those employed in the Republic.

There has been an increase in Federal imports from Europe in recent years even though the total value of such imports is still relatively small. The table at Appendix L shows the increase in purchases from France, Germany, the Netherlands, Italy and Japan since 1954. Many of these imports are of consumer goods which Britain could have supplied which find their way to the African. Details of selected imports by commodity are given in Appendix I, to which attention has already been drawn.

One of the most serious declines in supply from Britain has occurred in textiles. The making-up industry centred on Bulawayo is an excellent customer for piece-goods but is increasingly drawing supplies from the Continent and Japan. Recent inquiries made of large wholesale merchants showed that consignments of British textiles were being swamped by heavy importations from those countries; and the figures given in the relevant appendices reflect this trend. In the textile field one hears occasional criticism of British designs and colour; but the more frequent complaint is lack of attention to delivery dates, correspondence and correct packaging.

Competition from Japan has received considerable impetus during the last two years due to revisions of the Federal/Japanese Trade Arrangement allowing greater freedom to merchants importing Japanese goods. Total Japanese imports mainly of consumer goods have increased from £113,866 in 1954 to £1,966,174 in 1960; and for the first nine months of 1961 they totalled £1,797,000. Of the 1960 figure nearly £1,700,000 represented imports of cotton and rayon fabrics. The latest arrangement (January 1962) permits the importation of a much wider range of consumer goods.

PATTERN OF TRADE AND DISTRIBUTION*

General

One of the simplest methods by which the African can emulate the European in his purchases is to buy in the European shops

where he can be sure that he is not being sold an article specially manufactured for Africans, which might perhaps be of inferior quality. The use made by Africans of European shopping facilities has grown beyond all recognition in the last few years. Africans in large numbers are seen today in practically all shops, but especially in departmental and bazaar type stores in the large urban centres. They are also buying more in the smaller European shops, where they are generally welcome because they are cash customers. Many European-owned retail shops have discovered in the past few years that African purchasers have more than made up for the drop in sales to those European customers who still choose to patronize exclusively European establishments. In Northern Rhodesia and Nyasaland large and very strongly entrenched distributing groups are extensively engaged in country trading through chains of stores and depots. These large wholesale merchants with their widespread networks in the rural areas, a growing number of sole distributors (i.e. agents holding the franchise for the manufacture of a particular commodity) and, last but by no means least, certain local manufacturers who distribute direct are in the forefront of those who appreciate the potential of the African market in the remoter areas and the importance of establishing their brand names in them. It would be misleading to regard the Federation as a single unit with a central distribution point for the whole range of commodities finding their way to the African. Nyasaland and Barotseland form quite distinct distributive units; and, although Southern Rhodesia and the rest of Northern Rhodesia are covered completely and adequately by many firms operating from Salisbury or Bulawayo, there are differences to be observed between distributive methods in each. For example, in Southern Rhodesia the direct sales organizations of the manufacturers are more active in investigating the problem of direct trading in the rural areas, because the rural areas of Southern Rhodesia are those nearest to the factory.

Communications

The Federated territories are land locked; and overseas trade is entirely dependent on the facilities of sea ports in adjoining countries. Beira and Lourenco Marques in Portuguese East Africa (Mozambique) handle almost the entire export trade of the Federation and the bulk of its imports from overseas.

Generally speaking, Beira is the port serving Salisbury, the eastern half of Southern Rhodesia and Nyasaland. A railway line runs directly from Beira to Umtali where it joins up with the Rhodesia railway system. Another railway line runs from Beira to Nyasaland.

Lourenco Marques is the major port of entry for goods destined for Northern Rhodesia and the south-western half of Southern Rhodesia including Bulawayo. The South African ports including Cape Town and East London, but to a greater extent Durban and Port Elizabeth handle a share of the Federation's import trade. Routing goods via South Africa secures quicker delivery but at heavier costs than is incurred when consignments are routed via Mozambique ports of entry. Because of unsettled conditions in the Congo, extensive use is not at present being made of the Portuguese West African port of Lobito Bay, which is linked with Northern Rhodesia by the Benguela and Congo railways; but this port had gained in popularity in recent years as an entry port for imports destined for the northern part of Northern Rhodesia including the Copperbelt since this route is occassionally more economical and usually speedier than the route through Southern Rhodesia. For the remoter parts of Northern Rhodesia some use is made of Dar-es-Salaam as the port of entry, thence by rail to Lake Tanganyika and on by Lake steamer, final delivery taking place by road; this route is, however, of quite minor importance

Salisbury and Livingstone have international airports; and important air terminals have been established at Lusaka, Ndola, Blantyre and Bulawayo. Smaller airfields handle local traffic in other areas. The state-owned airline, the Central African Airways Corporation (C.A.A.), operating Viscount, D.C.3. and Beaver aircraft, provides daily services between the major towns of the Federation, and between them and Nairobi, Johannesburg, Elizabethville, Lourenco Marques, Beira and Durban. In co-operation with international airlines, such as B.O.A.C., B.U.A., S.A.A. and E.A.A., C.A.A. also maintain direct daily services to and from the Federation.

There are two major railway systems in the country. The more important is Rhodesia Railways which provides connections with Mozambique Railways, South African Railways and the Congo system. Internally, the main lines run from Umtali to Salisbury, to Bulawayo, to Livingstone, to Lusaka and to the Copperbelt and externally to Beira, Lourenco Marques and Johannesburg. There are important branch lines to Fort Victoria, to Sinoia and to West Nicholson. The most important missing link is the absence of any direct rail connection between Salisbury and Lusaka. Goods consigned to Northern Rhodesia from Salisbury must travel via Bulawayo over the Zambezi at Livingstone and then to Lusaka, a round trip of nearly 1,000 miles instead of what would be some 300 miles by the direct route.

The second railway system is the Nyasaland Railways owned and operated by two associated companies, Nyasaland Railways Limited and the Trans-Zambezia Railways Company Limited. The system is connected with the Mozambique Railways near the port of Beira. The line ends at Salima on Lake Nyasa; and communication with the central and northern provinces of Nyasaland is by road or by the Nyasaland Railways Lake Steamer service. There is no direct rail connection between the Rhodesias and Nyasaland; and goods from Southern Rhodesia consigned by rail to Nyasaland must go via Beira.

Some of the most impressive developments since the formation of the Federation have been the improvement of the trunk road system. Magnificent roads exist between Salisbury and Bulawayo, Salisbury and Umtali, Salisbury and Lusaka and the Copperbelt, while satisfactory roads connect Salisbury and Beit Bridge, Bulawayo and Beit Bridge, Bulawayo, Livingstone and Lusaka, and Salisbury and Nyasaland. The road from Salisbury is becoming the major trade route between Rhodesia and Nyasaland; but it is not tarred for the greater part of its length and connection is dependent on the ferry across the Zambezi at Tete in Mozambique, where traffic may be delayed for several days at this crossing point, especially when the Zambezi is in full flood. Road bridges cross the Zambezi at Livingstone and Chirundu; and there is no delay at these points. Other main roads in the Federation are shown on the map on page 7.

Distribution in Southern Rhodesia

(i) **Wholesale Merchants**

It has been a long standing feature of trade in Southern Rhodesia that the role of the wholesaler has been that of supplier of goods to the African market, while for the most part the European retailer has indented directly on the manufacturer or purchased through his buying and confirming house overseas. The European shopkeeper has used the wholesaler as a source of supply when temporarily short of stocks but in many cases has done so with

*Parts of this, and the following section, reproduce in an amplified and up-to-date form sections of the report 'The African Native Market in the Federation of Rhodesia and Nyasaland' by the British Trade Commissioner in Salisbury, published by H.M.S.O. in 1954.

reluctance as it usually causes a reduction in his profit. The wholesalers therefore have relied on the African market for the bulk of their turnover. Some specialize, for example, in piece-goods, hardware or bicycles; but most of them deal in general goods and are compelled to stock a wide range so as to be able to satisfy comprehensively the requirements of retail storekeepers. As the range of goods bought by Africans increases, wholesalers are obliged to expand the range of their own purchases: they need to be carefully selective to meet quick changes in taste and to keep abreast of changes in buying habits. References have already been made to the primary requirements for the African trade, viz., piece-goods, hardware, ready-made clothing and bedding, while tinned foods, radios, cosmetics, and druggists sundries, etc., are assuming increasing importance.

The wholesale merchant in Southern Rhodesia covers the whole of the rural areas with his travelling salesmen. In this territory the bulk of the sales are made by the traveller accepting orders from the retailer for later despatch by road or rail. No longer is the majority of the business done by direct sales from the truck. The wholesale merchants' main customers are the retail stores in the country districts and the farm stores. In addition there are the European retail outlets in the towns, the shops in the African townships or locations, and the native traders and hawkers. Distributors other than wholesale are today beginning to sell direct to the African retailer in competition with the traditional wholesaler, in rural as well as in urban areas.

The country stores are typical 'general' stores – universal providers to the small communities they serve. They are the local equivalent of the old-fashioned village stores in Britain, often serving as post offices and as a meeting place for gossip; but there the similarity ends. The architecture, the layout, the types of stocks, sales and display methods and credit systems are very different. Country stores range in size from comparatively large shops in Town Management Board Areas (small urban communities of a few hundred European inhabitants with a considerable surrounding African population), in villages and at natural meeting places, to tiny shacks in isolated districts and Native Reserve Areas. The geographical density of stores is low. Some of them are in remote places difficult of access especially in the rainy season; and it is the virtue of the wholesale merchants that all these customers are sought out diligently, visited regularly and carefully 'nursed'. Although store proprietors visit warehouses in Salisbury and Bulawayo at intervals depending on the remoteness of the stores, the sinews of the trade consist of the wholesalers' travelling representatives who tour the country constantly with panel vans carrying samples of their wares and the despatch department of the warehouses. Every effort is made by wholesale merchants to ensure delivery direct to stores; but often the best which can be done is the despatch of orders to the nearest railhead. The overseas manufacturer is likely to penetrate the African market more effectively by providing wholesalers with well prepared attractive samples. In general samples should be supplied well in advance of arrival of bulk consignments as it is a common practice to start selling before physical delivery of bulk orders. In instances, which fortunately are rare, when the bulk shipment does not conform to sample, considerable inconvenience is caused and difficulties are created which cannot always be smoothed over by adjustment of charges or other compensation.

The farm stores are less important than either the regular country stores or the urban stores. They are usually conducted by farmers as a kind of service to their labourers. They range from regularly appointed stores to small stocks of simple every-day requirements held in the farm kitchen in the care of the farmer's wife. Some farmers find the farm stores a useful additional source of revenue but in general they run their stores to help their labourers purchase goods at low prices. Facilities of this type are sometimes essential if recruits are to be attracted and labour forces maintained. Most farmers are unwilling to tie up even small sums in slow moving stock and tend to stick to well tried lines which they feel sure of selling – cigarettes, combs, khaki clothing, plastic raincoats, belts, soap and the like. Much depends, too, on the trading services in the neighbourhood; and on the whole there seems to be little likelihood of an extension of this type of trading. Unless exceptionally large, farm stores are not subject to the same attention by wholesale merchants as regular trading stores; and stocks for these stores are usually purchased during the course of weekly or monthly visits to towns. Farmers call on the wholesale trade and may buy on production of a general dealers' licence which is easily procured. A large part of the farm store trade is organized through a special group of wholesale merchants, the regional Farmers Co-operative Societies. These societies, which are all prosperous and very powerful, have almost a 100 per cent. membership of bona fide farmers in their "areas of influence". Although their main function is the provision of farming stores and equipment and the provision of credit facilities, the consumer needs of the farmer, his family and his work-people are not overlooked. All the societies have extensive African goods departments.

(ii) **Distributors**

In direct competition with the genuine wholesalers are the importing distributors. These usually hold the sole agency for a particular product which in the past has been sold both to the wholesaler and to the European retailer from stocks held in the country. Importing distributors are now adding the African retailer to their lists of customers. This later development is to be noticed principally in trade in foodstuffs and druggists sundries and at present is almost entirely confined to the African urban areas. Though the distributor can undercut the wholesaler in price, he is at some disadvantage in that he cannot normally offer the wide range of products required by the African retailer in the townships. It is only where the distributor includes among his agencies those of local manufacturers that he can hope in the long run seriously to embarrass the wholesaler in direct trade with the African retailer. The overheads of selling to African retail shops are high and the practical difficulties involved in servicing a very large number of small orders at frequent intervals can only be overcome by large-scale distributors with a numerous staff.

(iii) **Manufacturers' Direct Selling Organizations**

These probably present the biggest developing threat to the wholesale merchant. A number of manufacturers who are making a product which is already enjoying good sales to the African now undertake their own distribution. In Southern Rhodesia major examples are to be seen in the direct distribution of soap products, cheap cosmetics, razor blades and foodstuffs. Not many of the clothing manufacturers appear as yet to have adopted this practice. The distribution of a single product in the African rural areas is a costly business which calls for careful preliminary investigation of demands and tastes; and even those firms who have shown most interest and been most successful in this method of marketing their products tend to regard the operation as one of market promotion from which greater rewards will flow at a later date. They rightly see that for an increase in their own trade and profits in the future it is to the African consumer that they must now look. The profit from sales made in the rural areas does little more than offset the

expenses of maintaining trucks, personnel and other overheads; meanwhile the way for large sales in the future is being prepared by establishing reputations and above all their brand names in the eyes of conservative Africans in the reserves, thus building up what future competitors will find to be well nigh impregnable positions. In most cases these brand names have been impressed on the African mind in the European shopping centres; and none but the biggest manufacturers can at the moment afford this method of selling. But by setting up their own organizations they have taken away from the wholesale merchants a part of the latters' trade in products which often "sold themselves".

Distribution in Northern Rhodesia

(i) **Group and Chain Stores**

The distributional system in Northern Rhodesia, while in other respects similar to that in Southern Rhodesia, embodies certain large chains of group-owned country stores backed by central and strategically placed holding depots. These chains are to be found too in Nyasaland and in Barotseland – a part of Northern Rhodesia.

These group chains reflect the enterprise of certain of the wholesale merchants of Southern Rhodesia while others are ventures of some of the major merchanting houses of Britain. In some areas these stores conduct a two-way traffic. Being in isolated rural areas they buy native produce of various kinds for cash; but to some extent the procurement of native produce is becoming more the preserves of quasi-governmental organizations such as the Grain Marketing Board and the Dairy Marketing Board and, in Nyasaland, the African Produce and Marketing Board.

A typical chain store in Northern Rhodesia has five distribution centres or depots situated at Ndola, Fort Rosebery, Kawamba, Abercorn and Kasama; and these centres supply 16 wholesale stores and 61 retail stores arrayed throughout the territory. Side by side with the organization supplying and controlling these country stores is a strictly wholesale company, which supplies other retail outlets in Northern Rhodesia, and a number of departmental stores selling by retail to both the African and the European. It is organizations such as these which afford the major outlet for goods for the African market in Northern Rhodesia, for their activities embrace the three links between the manufacturer and the African – the wholesale merchant, the retail shop in the rural areas, and the departmental store shops in the European areas. Such organizations afford ideal outlets through which to introduce consumer goods to the African living in Northern Rhodesia.

(ii) **The large Wholesalers**

As in Southern Rhodesia, the wholesale merchants provide important trade links with the African market. Many of the Southern Rhodesian wholesalers send their travelling salesmen to Northern Rhodesia and in some cases have branch offices and depots throughout the area.

A difference from Southern Rhodesia is that in Northern Rhodesia a large number of Indian wholesale merchants are to be found. The Indian wholesaler is in close touch with the hundreds of small Indian retailers who are well established in Northern Rhodesia in the towns and on the "line of rail". There are, too, Indian-controlled group stores, one for example having 18 shops throughout the Northern and Luapula Province of the territory. The intrusion of the sole distributor and the sales organization of the manufacturer into the field of the wholesale merchant is not so marked in Northern Rhodesia as in the Southern Territory; but it is already taking place, though as yet in a more limited variety of commodities. It would seem that the manufacturer/distributor is feeling his way in the rural areas of Southern Rhodesia before venturing into those of the Northern Territories, and for the moment confining his efforts in Northern Rhodesia to the major towns. The introduction of the African to the credit card system has in Northern Rhodesia recently been made the subject of what seems likely to prove a successful experiment; and it is noteworthy that, at this early stage when not more than about 360 credit card accounts have so far been opened, the management in question can report that over 300 of them have turned out well.

At present the most hopeful setting for experiements in the extension of credit facilities is to be found among the more reliable of the better paid work-people in the general area of the Copperbelt and the administrative centre of Lusaka. This system, insofar as it may be capable of increasingly wide application, can be expected to enhance the general volume of sales particularly of better quality goods while it will also tend to "tie" the more reliable African customer to the source of extended credit.

Distribution in Nyasaland

The distribution system in Nyasaland possesses its own peculiarities in contrast with that of the Rhodesias. These have their origins in the lack of direct rail communications, the poor quality of the road links with Rhodesia, the commercial history of the territory which until 1957 was subject to the provisions of the Congo Basin Treaties and the fact that, alone of the three territories, the European element in the population is outnumbered by Asians who almost entirely are engaged in trading.

It is estimated that 80-90 per cent. of the total trade in Nyasaland passes through the hands of the Indian wholesalers or retailers. Indian wholesale merchants operate from Blantyre, Limbe and Lilongwe. A feature of retail trading is the large number of Indian-owned shops throughout the territory in which respect trading in Nyasaland probably has more in common with East Africa than the Rhodesias. Some of the Indian wholesale merchants employ travelling salesmen who take orders for despatch from the warehouses by road, rail and lake steamer; but a great deal of business is still done by the storekeeper visiting the wholesale warehouses to select goods and to take them away in his own transport. The Indian wholesalers import directly from the manufacturer against orders taken by commission agents. An increasing number of calls are being made by commission agents from Rhodesia who hold a Federal-wide franchise. On the other hand there is in Nyasaland a certain reluctance to purchase from distributors based in Rhodesia who do not hold stocks in Nyasaland: this is scarcely to be wondered at when it is realized that goods supplied from stocks held in Salisbury or Bulawayo usually have to travel by rail via Beira and thence north once more to Nyasaland. Such is the cost of transport in these cases that examples are apt to be quoted to show that it is sometimes cheaper for the Nyasaland storekeeper to purchase direct from wholesalers in Britain than from the distributor in Southern Rhodesia. British manufacturers should be particularly careful to satisfy themselves that their Rhodesian agents to whom they may have given the franchise also for Nyasaland in fact possess adequate facilities for distributing goods in Nyasaland and that it is not cheaper and quicker for the retailer there to import directly from Britain. If it is, and the overseas manufacturer refuses to accept direct orders, he will create antagonism to his products no matter how well known they may be. A careful analysis of the end retail cost and the service to the retailer should be made before distributive arrangements are finally concluded.

The African Lakes Corporation (trading under the name 'Mandala' meaning spectacles) ran in the past a large group chain of stores covering the three provinces of the Northern Territory but

Medical services have advanced, as is shown here at the out-patients' department at the African Hospital at Harari, Salisbury.

they have latterly relinquished some of their interests in the retail field. Another group (trading under the name of 'Kandodo', meaning the man with the walking stick), which is controlled by an important British merchanting house, operates an extensive chain of 62 retail country stores, a departmental store, a distributive organization servicing retail outlets and a wholesale business. They also encourage and assist African traders to engage in retail business in areas where they have no store of their own; and in this way a bond is being built up between these retailers and the travelling representatives of the group which augurs well for the future. The same group manufacture clothing in a local factory. The executive control of this group of enterprises has great knowledge and experience of the African market in Nyasaland; and any suggestions and advice which it might afford overseas manufacturers merit every consideration. It has been estimated that in Nyasaland there are 7,000 retail outlets, and to visit every one it would mean a journey of 2,750 miles which would take about nineteen weeks to complete. In a territory so large, so scattered and so primitive, successful exploitation of the market calls for association with agents and other distributors who have a sound knowledge of peculiar local conditions, of the standing of retailers and wholesalers, and of the diversified tastes and preferences of the ultimate purchasers: which in general may be taken to mean a manufacturers' representative or wholesaler possessed if possible of a base in Nyasaland itself.

In addition to the wholesalers and the group organizations already mentioned there are several wholesalers/distributors in a substantial way of business operating in Nyasaland. Some are branches of distributing concerns based on Southern Rhodesia and others are local firms either holding agencies in their own right from the manufacturer or acting on a sub-agency basis. Many are agents for Federal manufacturers; and the products mainly of Southern Rhodesian factories now account for 50-60 per cent. of the trade compared with about 15 per cent. at the time when Federation was brought in. The travelling salesmen of these distributors seek out all retail outlets and are normally able to draw on warehouses in Blantyre/Limbe or Lilongwe or in cases of desperate need give immediate delivery from their trucks.

Departmental stores of the 'bazaar' variety provide excellent outlets to the African market. Not only are goods laid out for inspection and the prices clearly marked but the merchandise displayed is identical with that bought by Europeans. On pay days the bazaar type of store is packed with African purchasers of all types of consumer goods.

Distribution in Barotseland

Conditions under which trade is conducted in Barotseland differ appreciably from those obtaining elsewhere in the Federation. Barotseland is an area of swamp and rivers; and commerce there is virtually restricted to retail stores managed by Africans and controlled by one or other of two European Groups. The main trading centres are Mongu and Mankoya and goods are distributed from bulk stores in these towns to some 200/300 retail stores which are often in remote and isolated villages on the Barotse plain. The operations of these two groups of stores are controlled from headquarters in Livingstone.

Stocks are consigned to Mongu and Mankoya by road from Lusaka via the Barotseland Transport Company. The Zambesi River route from Livingstone is no longer the main artery of communication.

Merchandise leaving the bulk stores for the retail shops is sent by road, paddle barge and canoe; and transport presents formidable problems. In the dry season goods can be taken to most places by road. At the height of the rainy season large barges can carry the supplies to the scattered communities living on higher ground on the plain. It is during the intervening periods between these two extremes that the major difficulties must be faced, since at these times neither the one nor the other form of transport can be used with confidence. In some places the roads are submerged, and in other the river levels are not high enough to permit anything but the shallowest barges to move freely.

The transactions of retail stores are supervised by intinerant European stock-takers who keep a careful watch on the trends of trade and report on their findings promptly to Mongu, Mankoya and Livingstone. Regional managers at these centres place direct orders on Rhodesian manufacturers, or make their requisitions on the wholesale organizations of the groups if supplies are of a kind that must be imported. Orders for the latter are generally obtained by agents calling on the group head offices

at Livingstone or on the groups' wholesale organizations in Salisbury and Kitwe.

Cattle are now purchased in Barotseland by the Cold Storage Commission; and hides and horns are often accepted by the retail shops of the groups in payment for goods sold. As in most other parts of Rhodesia and Nyasaland the major item of trade with Africans is now ready-made clothing and bedding, nearly all manufactured in the Federation. Traders in Mongu have observed a decline in the turnover of piece-goods which in this part of the Federation has largely been confined to a distinctive type of cotton print known as 'Barotse Print': this is all obtained from British sources and retails at 2s. 6d. a yard. Hardware, such as cooking pots, mugs and plates, also enjoy good sales together with cheap cosmetics, sweets, soap and salt. There does not appear to be a large demand for tinned foods in Barotseland; and an attempt to introduce supplies to the local inhabitants has not met with success owing to ready availability of Cassava, maize, rice, beef and fish.

Common to all territories

(i) **African (Native) Co-operatives**

African Consumer Co-operative Societies have not proved a conspicuous success in the Federation. In his report for 1960 the Commissioner for Co-operative development in Nyasaland said that "consumer co-operatives do not normally flourish unless they are operating in an area where competition from professional storekeepers is at a minimum. The chief stumbling blocks to their advancement are a lack of experience in wholesale buying and also in the large amount of petty stealing by employees". These observations are more or less true of consumer co-operatives in all three territories.

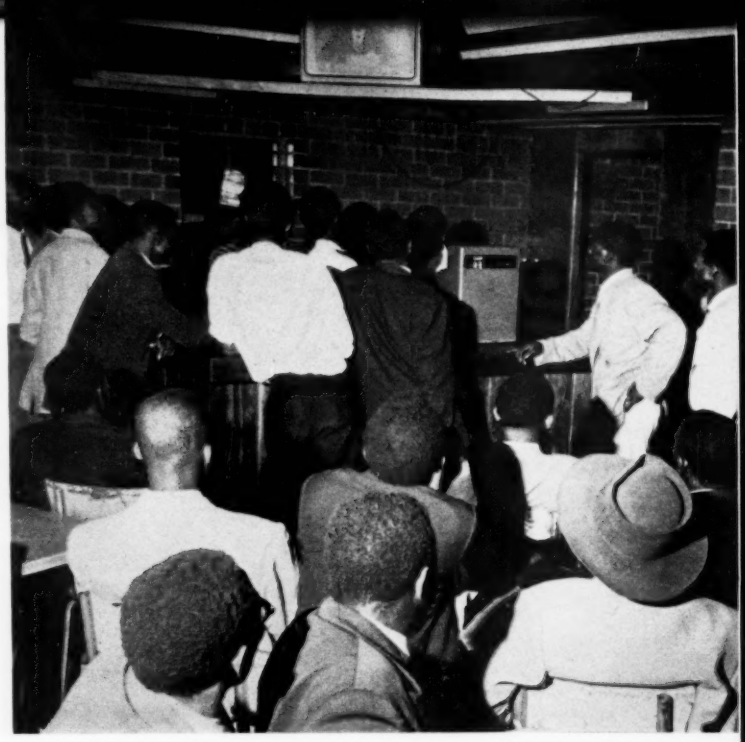
(ii) **Africans in Retail Trade**

African retail shopkeepers are beginning to make their mark on the pattern of trading. In Southern Rhodesia retail trading in the African townships is confined to Africans by law; and after a process of trial and error some African retailers have emerged who have built up considerable turnovers and secure good profits in all branches of retail trading. The most common type of store is, however, the 'general' store resembling the English village shop. The store is usually leased from the municipality and is well stocked with soaps, tinned foods, milk, sweets, bread, druggist sundries, hardware and other items discussed in that part of the report which deals with the pattern of buying.

Many of the stores in the large towns are attractive with spacious display shelves, refrigerated counter cabinets, adequate lighting and clean surroundings; but most stores in rural areas are a jumble of packing cases accommodating meagre stocks in cramped surroundings, lacking any adequate system of book-keeping and stock control. However some far-seeing distributors are actively engaged in helping the African to become competent retailers; and even those who do not go this far usually realize that the encouragement of the African retail shop-keeper as a class is necessary – or should at least prove helpful to their own future prosperity. Many are careful to nurture the progress of the retailer who shows promise with limited grants of credit, and to ensure that their salesmen do not press the owner to buy stocks beyond sensible limits.

(iii) **African Trade Associations**

The African traders themselves are beginning to realize the importance of co-operative effort in developing and protecting their mutual interests in businesses. Associations of African traders are found in the larger townships of Southern Rhodesia. As yet there is no combined or territorial African Chamber of Commerce but there is an African Traders' Association on the Copperbelt, and in Nyasaland the African Chamber of Commerce and Industries boasts some 3,000 members, most of whom however are fishermen and farmers.



Television began in Salisbury, capital of the Federation of Rhodesia and Nyasaland, during November 1960.

(iv) **Wholesale Trade by Africans**

As yet there are no Africans engaged in the wholesale trade and it is likely to take some years for Africans to acquire the capital and experience necessary to enter this field of commerce. Efforts are being made to encourage the larger African retailers in townships to group together in order to import stocks in bulk but without as yet any marked success.

(v) **Points of Sale**

The bulk of the stocks to be found in African retail shops derives from local sources of supply or manufacture; and the African customer who wishes to purchase clothing or other articles beyond his more simple daily requirements tends to shop in the main European shopping areas where he has a greater choice of wares.

There is little doubt that those Africans who have the money to spend on a wide variety of consumer goods make their purchases in the main shopping centres. On the Copperbelt, for example, Africans on the mines prefer to make shopping expeditions to towns such as Kitwe rather than patronise the smaller stores of African shopkeepers where choice is limited. Africans who have cash to spend prefer to spend it in a shop where there is a fixed selling price and where they can be confident that the article and the price does not vary according to the apparent means of the customer.

(vi) **Commission Agents**

A great deal of the import business into the Federation is initiated by commission agents, of whom there is a large cadre centred mainly on Salisbury and Bulawayo. The majority give excellent service to their principals; and no British manufacturer who produces wares for which there is a reasonable or even no more than a modest demand need lack for very long a good, reliable agent. The majority of agents carry groups of compatible 'lines' and

Many Africans now enjoy a higher standard of living, thus creating a new market for goods.

usually will be found much to prefer to undertake representation of British or South African manufacturers.

In making their contacts with the main wholesalers and many of the direct importers, agents in a territory of this size are obliged to cover enormous mileages by road during the course of their tours because the main business centres are so widely separated and smaller and more remote townships have to be covered. A road journey of 1,000 miles completed in two days would not strike many agents here as being exceptional. Apart from the few key towns on the trunk routes air travel is of limited utility, and in any case those travelling with extensive sample ranges must go by road. Thus an agent's travelling expenses are very heavy indeed in a territory of this nature; and though rentals are not unreasonable judged by British standards the cost of services and in particular of salaries is heavy. Nevertheless commissions received by agents tend not to be above those ordinarily paid to agents in other countries where business can be transacted with much greater facility.

By no means all agents or agency firms maintain or could possibly afford the expense of sub-offices in centres other than one of the main towns, which in general means Salisbury and Bulawayo. Personal contacts with customers therefore often depend on planned tours of a seasonal nature; and it is quite impossible to maintain here the kind of intimate personal contact between agent and customer which is commonplace in Britain. This is for most agents an insuperable difficulty which must be accepted as something inherent in the geography of the territory. It gives rise from time to time to complaints by merchants and importers that they have missed the benefits of what might have been advantageous offers or that agents' calls have not been made at the most propitious time for them or that in general the link through the agent to the manufacturer is too tenuous to be thoroughly effective. Such criticisms are readily to be understood where, as is by no means unusual, a British manufacturer has entrusted an agent in the Republic of South Africa with his representation in the Federation as well as in the Republic. Such criticisms, too, are heard in Northern Rhodesia and in Nyasaland of agents based on Salisbury who have no office in those territories; but here inter-territorial jealousy sometimes plays a part.

However self-evident, it is nevertheless true that effective coverage depends in each case upon the agent's industry and ability, which counts more than his domicile. Manufacturers and other exporters in Britain ought to ensure that they are fully aware of their agents' programmes for covering the areas for which they have given their franchise. A careful watch on the frequency with which they receive indents from different localities and the relative value of orders should also help to indicate the extent to which they have been well advised or otherwise in doing so.

(vii) Mail Order Business

There continues to be a considerable amount of trade to be secured by mail order from Britain. In 1960 the value of postal packages of under £20 in value imported into the Federation was £1,962,000; and a proportion of this amount, though it is unfortunately not specifically identifiable, must refer to mail-order business. The usual method of attracting a new customer is by the insertion of press advertisements in papers more commonly read by Africans. On receipt of an inquiry a catalogue is then despatched. African papers and especially the magazine 'Parade' (see below) carry advertisements for clothing and novelty goods which can be obtained from mail-order houses in Britain and more especially from South Africa. More British manufacturers might well benefit from greater resort to this means of sales promotion. Africans find great satisfaction in receiving a letter; and a glossy coloured catalogue will arouse genuine interest. When passed from hand to hand, particularly in rural areas, purchases may well be stimulated. Better educated Africans in the urban areas are inclined to consider that mail-order business is mainly for the lower income groups; and there class consciousness exerts a strong influence. They point out that not only are most items which are needed by Africans in their 'social stratum' now available in the bazaar-type stores in the urban shopping centres, but that African cash customers are now more readily welcomed in European shops, for them an important and very satisfactory consideration. Compilers of mail-order catalogues aimed at the urban African should bear in mind that a multiplicity of articles which can be more cheaply obtained locally will tend to discourage interest in other items.

There would seem to be an opportunity for a properly organized mail-order business to be serviced from stocks held in the main distributive centres of the Federation. Sales from these sources would with little doubt be enhanced by the careful selection and appointment of part-time African agents in the townships who could not only effect a wide distribution of brochures but also help the would-be purchaser to complete the order form.

(viii) **Confirming Houses**

In addition to confirming orders, affording credit, arranging shipments and insurance and disposing of such details as claims and disputes, British confirming houses maintain a regular commercial information service for the benefit of their Rhodesian establishments and customers, which is greatly appreciated in the territory and frequently stimulates the placing of orders. It is perhaps less generally appreciated than it should be by manufacturers that in the British confirming houses there is to be found concentrated a great mass of knowledge with which they may not be familiar; and this can very readily be tapped. In effect a good deal of most useful market research can be easily done at home through the good offices of confirming houses who are continuously being supplied with the well-informed and regular reports of their men on the spot. In this way gross errors and miscalculations can readily be avoided and time and money saved.

PRESENTATION FOR THE AFRICAN

(a) **Packing**

Most experts on product presentation in the African market are agreed that, in cases where sales of merchandise are being made to both Africans and Europeans, it is folly to design a new pack intended to be exclusively attractive to the African. An example can be quoted where a footwear manufacturer, whose shoes were selling well to Africans, designed a special box complete with a picture of a smiling and obviously satisfied African wearing a pair of his shoes. Sales at once fell away because to the African this indicated a special run of shoes, probably decidedly inferior to those mainly hitherto sold to Europeans in a box bearing a well-known and time-honoured label in English.

The African is attracted to well-known branded merchandise readily recognizable by him by its familiar package, shape and label. If for reasons of economy or the discovery of a more efficient packaging method the presentation must be altered, the new pack should first be displayed in European shops so that the African can be satisfied that the article within is unchanged. This is especially true of branded lines of cosmetics and druggists' sundries readily distinguishable from for example, the shape or the colour of the bottle. The urban African is a sedulous imitator of European fashion; and, once the change in pack is seen to be accepted by Europeans and is identified for him by competent advertising, his attachment to the brand will remain provided that, as has been mentioned, any important secondary use which he may previously have been able to make of the original pack, box, bottle or tin has not been eliminated in the new design. Changes in packs for goods which sell well to Africans should only be introduced after careful consideration of the factors, not necessarily very obvious to the European, which have accounted for their previous popularity.

When considering a new pack it may be useful to bear in mind experiments which have shown that symbols have a greater impact on an African customer than colour. Africans are slow to appreciate subtle changes in colour or pastel shades and in some areas of Africa it has proved necessary to distinguish differences in quality or flavour by the imprint of a symbol such as a square or circle. If a colour change is contemplated it should be a bold one, say from red to blue; but the basic design of the pack should if possible remain unaltered.

While very little correlated information is available on the best way of presenting a completely new product so as to enhance its appeal primarily to Africans, the golden rule should be to seek sound advice locally in order to avoid blunders.

(b) **Brand Names and Trade Marks**

Local manufacturers, well aware of the hold on the market which a popular brand name can establish, themselves make a careful choice where their own products are concerned and are at pains to design an apt and clearly understandable trade mark. British manufacturers should copy their example when considering brand names and trade marks for use in Africa. Suppose, for example, a firm called Wheeler were to be making good sales of tinned milk with a label showing prominently a red bicycle, the African customers would almost certainly be asking the store-keeper for 'red bicycle milk' and quite improbably for 'a tin of Wheeler's milk'.

To obtain popular recognition the brand name and trade mark must be prominently displayed and must not embody any symbol or animal image which is the subject of a native taboo. Such symbols as might employ the shapes of serpents or more especially chameleons are anathema to Africans and would fairly close the door to any prospect of selling to Africans goods that might carry them.

Sometimes a particular product is so well known that its brand name becomes the name of the article. Indeed several examples of this are to be found in Britain; but the tendency is even stronger in these territories where a brand or trade name not infrequently becomes the general reference to products of a comparable sort. To quote an actual example, portable radios irrespective of make are often referred to as 'Supersonics', the trade name of a popular transistorized set made in Bulawayo.

(c) **Advertising**

The rewards which may flow from advertising directed at the African are fully appreciated in local commercial and industrial circles; and here it is necessary where they exist to discover and exploit the reasons which may motivate the African to buy a particular product, which may be quite different from those which influence a European to buy the identical article. Local advertising contractors have by now built up a considerable store of knowledge of these matters; and their advice should be sought before any campaign of advertising intended to impinge upon the African consciousness is undertaken. Errors, for instance in slogans or pictorial advertising, could prove quite disastrous. From their practical experience in popularizing with the African buyer principally in mind a wide range of the products in day-to-day trade, the local advertising contractor is well able to give sound guidance as to choice of the various media available and their relative merits for a particular promotional purpose. At the present time these are the

press, the commercial radio, television, bus, point of sale and street poster advertisements.

(i) **The Press**

The 'European' daily press in the Federation is controlled by a single group which publishes daily papers in Salisbury, Bulawayo and Ndola. While these papers are designed for and are read almost exclusively by Europeans they also reach the small number of better educated and more intelligent Africans who read them but who are not typical of the African population in general. These newspapers do not penetrate into the rural areas; and to advertise in them in the expectation of reaching the African consumer would be largely a wasted effort. The same may be said of magazines published mainly for the benefit of Europeans.

The great bulk of the African population is served by its own press; and the most important circulation is controlled by African Newspapers (Pvt.) Ltd., of Salisbury, which has recently been acquired by a well-known Canadian and British newspaper group. The following papers are now published:

1. 'THE DAILY NEWS'

Published **daily** in Southern Rhodesia in two editions from Salisbury and Bulawayo. All advertising is common to both editions.

2. 'THE DAILY NEWS' (WEEKEND EDITION)

This is published on Saturdays in two editions, Southern and Northern: the Southern edition covers Southern Rhodesia and the Northern edition covers Northern Rhodesia and Nyasaland. Each edition consists of twenty-four pages and sells at 6d. per copy. Advertising can be arranged for both editions at a combined rate.

3. 'PARADE'

This is a **monthly** pictorial magazine of some 80/100 pages which is sold at 9d. per copy. It has bright style, ample space for advertising and employs colour; it enjoys a wide circulation and great popularity. With undoubted truth it claims to be 'Central Africa's most widely read magazine.'

4. 'POPULAR POST'

A **monthly** publication containing details of the Federal Broadcasting Corporation African Service Programmes. It also contains feature articles, short stories and pictures. Price 3d. per copy it has a circulation of some 11,000 most of which is in Southern Rhodesia.

The circulation figures of all these publications do not reveal the true extent of their influence for it has been estimated that there is a multiple readership of five per copy of the daily paper, eight to ten of the weekly editions and as high as fifteen for the monthly magazine.

Another important weekly production is the 'African Mail' published in Lusaka and with offices in Salisbury and on the Copperbelt. Unlike those of the African Newspapers Group it is printed entirely in English and intended for the more educated middle-class African. It has a circulation of about 16,000 copies.

Full details of advertising rates and specimen papers can be obtained from the offices of the respective companies; and complete sets of recent issues can be seen at the Export Services Branch of the Board of Trade in London. In addition to the publications mentioned above there are also South African magazines such as 'Drum' and 'Zonk' published in the Federation, together with a variety of company magazines foremost among which are the papers or news sheets of the various mining companies on the Copperbelt for distribution among their African and other employees which enjoy a more limited circulation.

The advertising managers of the newspapers and periodicals mentioned are well placed to offer advice on suitable advertising material; but there are one or two general rules to be observed:

1. The text should always be prepared in English for advertising in Southern Rhodesia; subsequently it may be reproduced either wholly or in part in appropriate vernacular languages. In Northern Rhodesia and Nyasaland it is more common to advertise entirely in the vernacular although mixed texts are also employed.

2. Texts should be simple and should avoid idiom strange to the African. It does not follow that because English is read and understood it can safely be employed in its more complex construction.

3. In particular, play on words should be avoided. They may misfire completely. On the other hand words such as 'Clean your stomach out with XYZ' do not offend African readers as they might European sufferers.

4. Great care should be taken to avoid statements which might be twisted or interpreted as in any sense derogatory to Africans, or caricatures of Africans in illustrations, or patronizing phrases.

5. Photographs and drawings of Africans are commonly used to illustrate advertising matter. When they are employed the figures should be represented as well groomed and fashionably dressed in styles favoured at the time. A commonly used expression is 'you **too** can be admired if . . . ': above all things Africans like to be admired.

6. There is little point in introducing British personalities into illustrations unless they are of individuals likely to be well-known to the majority of Africans; there are few who qualify in this way. It seems far better to use personalities of their own race, known to Africans in the Federation. Much current advertising matter voices the opinions of African variety, radio and television artistes and sporting notabilities singly or in teams.

7. Advertisements of the "strip cartoon" variety should illustrate situations strictly familiar to Africans.

8. Brand names should be displayed prominently. Subtlety is not profitable.

(ii) **Commercial Radio and Television**

The Federal Broadcasting Corporation commenced its African Commercial Service in July 1961 and a wholly new medium for advertising for African consumption has been opened up. It is estimated that well over half a million Africans regularly listen to the African services of the F.B.C., either in English or in one or other of the vernacular tongues. This and similar media are peculiarly important in that listening to the radio does not require literacy and no other media can rival the potential scope of radio and television advertising. Details of spot and time signal advertising rates are given in Appendix M together with the times of transmission and the language cover provided. Further details can be obtained from the manager of the commercial service of the F.B.C., P.O. Box 3456, Causeway, Salisbury, Southern Rhodesia. Most of the products which are regularly advertised on the radio have an already established market backed by a sales organization capable of satisfying smoothly any sudden increase in demand which may result from a sales promotional campaign launched over the air. If a product sold to this market were to be made the subject of an advertising campaign of this kind it would be very necessary, because of the long distance imported supplies must travel to reach points of distribution here, to be sure that adequate stocks have

An example of African housing supplied to workers of the Imperial Tobacco Co., Msasa.

been provided to cope without delay with any sudden large demand that might be generated and also that adequate distributional arrangements had been completed in anticipation of the event.

Television is as yet not so suitable a medium for advertising to Africans because the programmes themselves are designed solely for European consumption. Not many Africans can afford television sets and any impact that this form of advertising may make on the African is for the moment purely incidental. Nevertheless into the minds of those few Africans who do see televesion at present useful brand images are instilled and a preference for goods primarily intended for European consumption is being cultivated.

(iii) **Bus Advertising**

Africans who are apt to move frequently in considerable numbers between the rural areas and the towns in general travel over very long distances; and even if part of the journey can be made by train a lengthy bus journey is usually necessary at one stage or another. Many Africans regularly travel by bus between the African townships and their places of work. In the year 1960-61 one of the largest bus operators in the Federation carried the following number of African passengers:

Southern Rhodesia	
Salisbury	10,426,000
Bulawayo	6,306,000
Other towns in Southern Rhodesia	2,050,000
Long distance routes	937,000
Northern Rhodesia	
Urban and mine traffic	4,004,000
Long distance routes	315,000
Nyasaland	
Blantyre/Limbe	1,412,000
Long distance routes	2,810,000

Leading makers of well-known products for which there is a broad territorial demand make regular use of the bus placard type of advertisement. Not only is there opportunity for visual display but on long distance buses a Rhodesian firm arranges to supply tapes of recorded music with which to enliven the journey which can be interspersed with advertising spots. In passing it should be mentioned that these tapes are also being supplied for transmission over the internal radio diffusion systems in some African townships.

Central African Airways run 'skybus' services to Nyasaland and Northern Rhodesia from Salisbury.

(iv) **Point of Sale Advertising**

As the standard of presentation of goods improves in African stores, and to a large extent it is doing so in urban areas, the scope for appealing point of sale advertising material is widening. Distribution of such advertising material is not an easy matter and is best effected by direct contact with the shop-keeper, so that in general it will be found that this method of approach is almost exclusively employed by suppliers who distribute their products direct to African retailers through their own selling organizations or by similarly equipped sole distributors. Goods which are sold through wholesale channels or by commission agents generally lack point of sale advertising material. There is however no doubt that wall placards for internal and external display are very popular; and some retail shops in African townships and rural areas are well plastered with them. Close collaboration with the commission agent or with large wholesalers would be necessary if satisfactory ways and means were to be found of distributing point-of-sale material to the small retail stores.

Street advertising for the African market is probably not very effective although local manufacturers do make use of available space at their own factories on the industrial sites. In the town centres hoarding space is usually devoted to advertising for the European market.

(v) **Films**

Although most cinemas in the Federation are now open to all races, attendance by Africans is still rare. However film shows are put on regularly in government, municipal and company townships; and the Southern Rhodesian Native Affairs Department have mobile cinema vans which operate in rural areas. African Newspapers (Pvt.) Ltd. have a Film Division which can arrange for advertising films to be put on at some of these film shows. Slides can also be shown by the mobile cinema vans on the urban circuits. Rates vary according to the screening time and the number of weeks or months for which the films are displayed. These films are seen by a good cross-section of Africans; and in the various native townships near Salisbury, for example, it is estimated that up to 27,000 Africans see a film show every week. Details of rates are obtainable from the Board of Trade.

APPENDIX A

BREAKDOWN OF POPULATION BY RACES AT JUNE 30, 1961

	European	African	Coloured	Asian
Federal State	303,940	8,290,000	13,940	25,310
Southern Rhodesia	220,610	2,960,000	10,530	6,990
Northern Rhodesia	74,600	2,430,000	1,910	7,740
Nyasaland	8,730	2,900,000	1,500	10,580

N.B. (a) Figures for European, Coloured and Asian population are taken from the September 1961 census.

(b) Figures for African population are estimates at February 1962.

APPENDIX B

DISTRIBUTION OF AFRICAN POPULATION BY MAJOR TOWNS AT DECEMBER 31, 1960

Urban area (including neighbouring suburbs and mine townships)	Population
Southern Rhodesia	
Bulawayo	145,000
Fort Victoria	9,000
Gatooma	8,000
Gwelo	25,000
Que Que	9,000
Salisbury	190,000
Shabani	9,000
Umtali	28,000
Wankie	17,000
Northern Rhodesia	
Bancroft	17,000
Broken Hill	29,000
Chingola-Nchanga	37,000
Kitwe-Nkana	73,000
Livingstone	24,000
Luanshya-Roan Antelope	53,000
Lusaka	67,000
Mufulira	58,000
Ndola	68,000
Nyasaland	
Blantyre-Limbe	50,000
TOTAL:	916,000

APPENDIX C

ANALYSIS OF AFRICANS EMPLOYED IN VARIOUS INDUSTRIES AND WAGES PAID (1960)

Industry	Number	Wages paid to Africans
		£'000
Agriculture	375,000	18,508
Mining and Quarrying	93,600	15,469
Manufacturing	124,900	13,940
Electricity and Water	9,900	1,069
Building and Construction	122,900	11,018
Commerce	56,100	5,702
Banking and Insurance	2,400	298
Transport and Communications	27,200	3,906
Government Administration	51,500	6,068
Education	28,200	3,414
Health	12,900	1,500
Private Domestic Services	154,600	11,398
Other Services	37,300	3,417
TOTAL:	1,096,500	95,707

APPENDIX D

URBAN AFRICAN EMPLOYMENT AND WAGE RATES IN SALISBURY, BULAWAYO, GWELO AND UMTALI (1958-1959)

Occupation	No. Employed	Average Wage Rates per month of Unrationed Employees	Average Wage Rates per month of rationed Employees
		£ s. d.	£ s. d.
Professional Technical and Related workers:			
Teachers	1,000	15 2 0	—
Nurses (including probationers)	710	—	—
Others	300	—	—
Sales Workers:			
Shop assistants and shopkeepers	760	10 2 0	—
Hawkers, pedlars and vendors	860	—	—
Assistants to shop sales workers	4,270	7 0 0	4 0 0
Petrol pump attendants	840	7 17 0	—
Others	30	—	—
Agricultural and Related Workers	—	—	2 14 0
Including gardeners, groundsmen and stable boys but excluding private domestic servants)	3,220	6 10 0	4 3 0
Quarrying (Mainly Labourers):	1,060	6 18 0	—
Transport & Communication Occupations:			
Drivers of motor vehicles	5,970	12 17 0	—
Office messengers	5,520	7 17 0	—
Cycle delivery workers	2,580	6 16 0	—
Others	950	—	—
Craftsmen, Production Process and Related Workers and Labourers n.e.e.			
Sewers, tailors and dressmakers	3,830	7 13 0	—
Other workers in textile factories	3,030	6 17 0	—
Shoe repairers and leather workers	1,540	6 14 0	—
Carpenters and related workers	960	12 3 0	—
Painters	620	13 14 0	—
Bricklayers, plasterers and construction workers	1,040	15 12 0	—
Brickfield workers	2,530	6 12 0	—
Food process workers	3,770	6 14 0	4 9 0
Tobacco floor and factory workers	6,140	6 13 0	4 7 0
Packers and related workers	1,140	7 1 0	—
Storemen, warehousemen and porters	980	7 12 0	—
Truck and lorry loaders	5,000	6 13 0	—
Labourers on railways	5,220	9 1 0	—
Labourers in building and construction	12,810	6 13 0	—
Labourers in municipalities	2,840	6 17 0	—
Labourers, other	15,880	—	—
Other craftsmen, production process and related workers n.e.e.	2,570	—	—
Service Workers:			
Policemen, detectives, guards and firemen	3,720	10 3 0	—
Cooks (not private domestic)	1,380	6 12 0	5 9 0
Private domestic servants (including gardeners)	58,060	—	Male 3 4 0 Female 3 17 0
Waiters and waitresses	2,330	7 1 0	4 18 0
Cleaners	3,510	6 12 0	—
Workers in laundries and dry cleaners	1,330	6 13 0	—
Others	770	—	—
Watchmen and caretakers	1,320	7 9 0	—
Occupation unknown and not adequetly described	6,850	—	—
Others in Employment but not covered by surveys	*24,000	—	—
TOTAL NUMBER EMPLOYED :	204,000		

*Most of these were on leave, in hospital, on duty outside the town surveyed, or lived outside the area covered by the survey.

APPENDIX E

AFRICAN EMPLOYMENT AND WAGE RATES IN *EIGHT MAJOR TOWNS OF NORTHERN RHODESIA (1960)

Occupation	Number Employed	Average Earnings per month
Professional technical and related workers	2,560	—
Administrative, executive and managerial	340	—
Boss boys	1,450	more than £15
Clerical workers	3,760	—
Female clerical workers and sales workers	550	—
Sales Workers		
Salesmen and shopkeepers	1,330	13 13 2
Hawkers, pedlars and vendors	3,120	—
Storemen and warehousemen	1,750	7 15 11
Other sales workers	1,550	8 17 1
Miners, Quarrymen and Related Workers		
Surface workers	7,940	See separate Table at Appendix J.
Underground workers	12,340	
Transport and Communication		
Drivers of motorized vehicles	5,280	£14 0 2
Office messengers	3,270	7 1 9
Other (including postmen)	1,130	—
Craftsmen, Production Process and Related Workers and Labourers n.e.e.		
Painters	1,000	8 12 4
Sewers and tailors	1,240	8 18 9
Carpenters and floorlayers	2,090	11 8 11
Motor mechanics	2,290	7 11 5
Builders and bricklayers	2,310	10 16 11
Other craftsmen and production process workers	4,210	—
Truck and lorry loaders	2,210	5 10 3
Assistants to artisans	4,910	—
Labourers in building and construction	8,000	5 6 6
Labourers on railway	2,610	8 0 0 to 12 2 6
Labourers, other	2,290	—
Labourers in municipalities	1,970	4 15 4
Brickfield workers	1,520	—
Service, Sport and Recreation Workers		
Policemen, warders, soldiers and guards	4,350	6 13 8
Office cleaners, etc.	1,540	5 19 1
Watchmen and caretakers	1,840	6 9 4
Domestic servants	21,620	4 5 0 (Garden boys) to 7 18 0 (Cook)
Other service workers	3,480	—
Other female occupations	130	—
Activities not adequately described	6,070	—
TOTAL:	122,050	

*The towns covered are Lusaka, Broken Hill, Ndola, Luanshya, Kitwe, Mufulira, Chingola and Livingstone.

APPENDIX F

BREAKDOWN OF AFRICANS IN EMPLOYMENT IN NYASALAND BY INDUSTRY (1960)

Agriculture	91,900
Manufacturing and repair work	14,400
Quarrying	300
Electricity and water services	1,700
Construction	22,600
Commerce	10,400
Finance	100
Transport and Communications	4,600
Government Administration	10,700
Education Services	6,600
Health Services	2,700
Private domestic services	14,300
Other Services	7,900
TOTAL:	188,200

APPENDIX G

BUDGET SURVEYS OF AFRICANS IN SALISBURY, BULAWAYO, UMTALI AND GWELO (1958/59)

Expenditure Head and Item	Cash Expenditure Converted to Annual Rate	
		£
Foodstuffs:		
Mealie meal		1,300,000
Meat		1,815,000
Bread		1,219,000
Sugar		794,000
Fish		172,000
Cooking oil		56,000
Fresh milk		229,000
Tinned and other milk		187,000
Tea		181,000
Margarine and butter		105,000
Vegetables		364,000
Fruit		80,000
Poultry and eggs		45,000
Rice		59,000
Jams		39,000
Buns, cakes, etc.		161,000
Meals away from home		158,000
Other foodstuffs		265,000
TOTAL FOODSTUFFS:	46·4 per cent.	7,229,000
Clothing and Footwear:		
Men's Clothing:		
Shirts		497,000
Flannel trousers		423,000
Khaki trousers		91,000
Jackets and suits		247,000
Leather shoes		225,000
Trunks and vests		90,000
Hats		63,000
Other clothing and footwear		366,000
TOTAL MEN'S CLOTHING:		2,002,000

APPENDIX G (Cont.)

Expenditure Head and Item	Cash Expenditure Converted to Annual Rate	
		£
Women's Clothing:		
Dresses		201,000
Dress material		83,000
Underwear		44,000
Skirts		21,000
Other women's clothing		130,000
TOTAL WOMEN'S CLOTHING:		479,000
Children's Clothing:		
Dresses		37,000
Shirts and shorts		40,000
Other children's Clothing		62,000
TOTAL CHILDREN'S CLOTHING:		139,000
Repairs, etc.		68,000
TOTAL CLOTHING AND FOOTWEAR:	17·2 per cent.	2,688,000
Drink and Tobacco:		
Cigarettes and tobacco		305,000
African beer		843,000
European beer		242,000
Soft drinks		147,000
Wines, etc.		14,000
TOTAL DRINK AND TOBACCO:	10 per cent.	1,551,000
Fuel and Light:		
Firewood		229,000
Paraffin		197,000
Matches		39,000
Candles		25,000
TOTAL FUEL AND LIGHT:	3·1 per cent.	490,000
Household Stores:		
Soap		250,000
Blankets		238,000
Linen		99,000
Furniture		103,000
Other		209,000
TOTAL HOUSEHOLD STORES:	5·8 per cent.	899,000
Bicycle Expenses	1·9 per cent.	300,000
Miscellaneous:		
Fares		330,000
Medicines		26,000
Doctors, herbalists, etc.		50,000
Dry cleaning and laundry		84,000
House repairs and alterations		28,000
Petrol and oil		28,000
Auto repairs		48,000
Money sent to rural areas	3·2 per cent.	502,000
Postage and stationery		51,000
Watches and repairs		41,000
Migrant labour stamps		120,000
Other		447,000
TOTAL MISCELLANEOUS:		1,755,000
Taxes Due		384,000
House Payments and Rent		296,000
TOTAL EXPENDITURE:	100 per cent.	15,592,000
INCOME:		16,604,000

APPENDIX H

BUDGET SURVEYS OF AFRICANS IN EIGHT MAJOR TOWNS OF NORTHERN RHODESIA (1960)

Expenditure Head and Item	Cash Expenditure Converted to Annual Rate	
		£
Foodstuffs:		
Mealie meal		2,044,000
Meat		1,390,000
Dried fish		928,000
Fresh fish		459,000
Bread		323,000
Sugar		287,000
Liquid milk		47,000
Tinned and other milk		83,000
Cooking oil		336,000
Margarine and butter		39,000
Tea		40,000
Rice		57,000
Beans		109,000
Groundnuts		48,000
Tomatoes		106,000
Cabbage		115,000
Sweet and other potatoes		50,000
Onions		81,000
Other vegetables		104,000
Salt		44,000
Poultry and eggs		68,000
Sausages and bacon		37,000
Tinned meat and fish		56,000
Fruit		27,000
Buns, biscuits, etc.		66,000
Meals away		38,000
Other foodstuffs		100,000
TOTAL FOODSTUFFS:	44·4 per cent.	7,082,000
Clothing and Footwear:		
Men's Clothing:		
Shirts		437,000
Flannel trousers, etc.		418,000
Khaki trousers		45,000
Jackets and suits		179,000
Shorts		63,000
Jerseys		49,000
Trunks and vests		44,000
Canvas shoes		38,000
Leather shoes		165,000
Hats		40,000
Other		69,000
TOTAL MEN'S CLOTHING:		1,547,000
Women's Clothing:		
Dresses		592,000
Dress material		57,000
Underwear		68,000
Shoes		100,000
Blouses and skirts		61,000
Other		38,000
TOTAL WOMEN'S CLOTHING:		916,000
Children's Clothing:		
Dresses		114,000
Shirts		39,000
Shorts		41,000
School uniforms		53,000
Shoes		32,000
Other		44,000
TOTAL CHILDREN'S CLOTHING:		323,000
Repairs and Making-up Costs:		13,000
TOTAL CLOTHING AND FOOTWEAR:	17·9 per cent.	2,799,000
Fuel and Light:		
Charcoal		259,000
Firewood		106,000
Paraffin		66,000
Matches		30,000
Candles		61,000
TOTAL FUEL AND LIGHT:	3·3 per cent.	522,000
Drink and Tobacco:		
Snuff, tobacco and cigarettes		184,000
African beer		1,902,000
Bottle beer		435,000
Soft drinks and other		47,000
TOTAL DRINK AND TOBACCO:	16 per cent.	2,568,000
Cycle Expenses:		
New and secondhand cycles		194,000
Spares and repairs		26,000
TOTAL CYCLE EXPENSES:		220,000
Household Stores:		
Soaps		242,000
Cooking pots and kettles		67,000
Blankets		180,000
Sheets, towels and linen		148,000
Furniture		172,000
Mattresses and pillows		89,000
Radios, batteries, repairs		223,000
Other		246,000
TOTAL HOUSEHOLD STORES:	8·5 per cent.	1,367,000
Miscellaneous:		
Stationery and postage		37,000
Fares		136,000
Chemist's sundries		82,000
Doctors, herbalists, etc.		41,000
Watches, clocks and repairs		96,000
Taxes due		113,000
Money sent to rural areas		246,000
Autos and auto repairs		186,000
School fees		89,000
Other items		352,000
TOTAL MISCELLANEOUS:		1,378,000
TOTAL EXPENDITURE:		15,936,000
Income:		17,043,000
Not Accounted For:		1,107,000

APPENDIX I

This consists of import statistics for selected groups of commodities (of which Africans are significant buyers) for the years 1959, 1960 and 1961. Each group is shown on a separate sheet as a "sub-appendix" and numbered in accordance with the following list.

SUB-APPENDIX

I.1 Perfumery, cosmetics, dentifrices and other toilet preparations (page 32)
I.2 Soap, toilet (page 32)
I.3 Polishes (page 33)
I.4 Leather manufactures n.e.s. (page 33)
I.5 Cotton fabrics n.e.s. (page 33)
I.6 Woollen and worsted fabrics (page 34)
I.7 Rayon fabrics (page 34)
I.8 Blankets and rugs (page 34)
I.9 Towels, linen and articles for furnishing n.e.s (page 35)
I.10 Carpets and mats of textile fibres (page 35)
I.11 Enamelware and holloware (page 36)
I.12 Sewing machines, domestic, complete (36)
I.13 Television receivers (page 36)
I.14 Radios and radiograms (page 37)
I.15 Radio and Television spares (page 37)
I.16 Domestic electrical equipment n.e.s. including parts n.e.s. (excluding refrigerators, stoves, vacuum cleaners, washing machines) (page 37)
I.17 Bicycles (page 38)
I.18 Bicycle parts (page 38)
I.19 Stockings and hose (page 38)
I.20 Outer garments (page 39)
I.21 Shirts (page 39)
I.22 Pullovers and jerseys (page 40)
I.23 Singlets, vests and T. shirts (page 40)
I.24 Other underclothing (page 41)
I.25 Other clothing (page 41)
I.26 All footwear imports;
(i) Footwear, canvas (page 41)
(ii) Footwear, men's and boys', wholly or mainly leather (page 42)
(iii) Footwear, women's and girls', wholly or mainly leather (page 42)
(iv) Slippers, n.e.s. (page 42)
(v) Infants' footwear (page 43)
(vi) Sandals, n.e.s. (page 43)
(vii) Footwear, n.e.s. (page 43)
I.27 Watches and parts (page 44)
I.28 Jewellery, including imitation (page 44)

SUB-APPENDIX I 1

PERFUMERY, COSMETICS, DENTIFRICES AND OTHER TOILET PREPARATIONS

	1959 Value £	1960 Value £	1961 Value £
Total:	694,548	724,132	623,235
of which			
United Kingdom	277,692	303,989	302,140
South Africa	346,106	355,365	251,685
India	4,427	4,755	3,623
Hong Kong	3,701	2,165	2,063
British West Indies	1,721	1,376	—
France	20,787	22,419	24,883
Algeria	2,907	7,028	4,889
German Federal Republic	1,270	2,034	3,547
Netherlands	6,007	5,262	4,434
Italy	1,523	1,803	647
United States	26,609	16,177	23,516

SUB-APPENDIX I 2

SOAP, TOILET

	1959 Value £	1960 Value £	1961 Value £
Total:	164,429	151,910	81,282
of which			
United Kingdom	62,061	48,958	43,198
South Africa	99,265	100,012	33,621
German Federal Republic	226	1,079	1

SUB-APPENDIX I 3

POLISHES

	1959 Value £	1960 Value £	1961 Value £
Total:	395,187	352,321	281,153
of which			
United Kingdom	46,144	36,952	49,143
South Africa	348,115	314,104	230,808

SUB-APPENDIX I 4

LEATHER MANUFACTURES, N.E.S.

	1959 Value £	1960 Value £	1961 Value £
Total:	133,418	129,191	124,380
of which			
United Kingdom	50,714	54,139	50,102
Australia	1,243	404	1,257
South Africa	71,953	59,522	57,648
India	2,224	1,437	1,666
German Federal Republic	5,267	8,820	9,286
Italy	968	1,244	724
United States	150	1,368	855

SUB-APPENDIX I 5

COTTON FABRICS, N.E.S.

	1959		1960		1961	
	Sq. Yds.	Value £	Sq. Yds.	Value £	Sq. Yds.	Value £
Total:	41,613,746	4,638,102	48,612,810	5,406,279	47,046,478	5,266,161
of which						
United Kingdom	22,033,268	2,693,334	20,026,115	2,403,560	15,362,308	1,960,088
Canada	1,543	89	47,623	3,823	131,984	11,603
South Africa	642,413	82,371	532,912	62,741	294,416	37,260
India	5,239,540	333,940	3,801,851	253,865	3,904,701	250,129
Hong Kong	944,066	96,364	913,036	101,107	1,160,057	119,908
*Federation of Rhodesia and Nyasaland	10,771	2,250	4,751	1,849	296	68
British West Indies	920,953	50,446	610,192	32,946	378,064	20,541
Austria	316,880	39,319	245,910	33,948	93,900	13,397
Belgium	96,939	23,223	242,266	37,301	433,156	54,935
Czechoslovakia	1,189,019	82,435	2,171,574	150,208	1,829,998	120,391
France	882,153	81,757	2,372,101	225,393	1,208,467	142,933
German Federal Republic	1,216,585	157,368	1,668,689	222,577	1,195,946	154,320
Netherlands	1,676,647	206,040	3,308,763	387,503	3,867,187	461,745
Italy	190,577	26,543	338,199	40,694	523,210	80,336
Poland	—	—	92,887	6,412	593,232	36,750
Portugal	114,553	6,676	663,763	35,324	1,818,757	114,026
Spain	2,705	369	954,793	66,437	2,140,247	161,099
Sweden	673	262	17,420	2,042	67,560	6,983
Switzerland	80,818	22,612	128,446	31,112	157,750	43,793
Israel	55,469	7,941	239,230	37,585	459,473	78,518
Japan	5,259,661	621,354	7,800,479	987,917	7,627,660	976,649
United States	719,213	100,871	1,491,945	198,911	2,882,932	248,887
Brazil	11,294	851	923,937	81,441	657,065	54,232

*Returned exports

SUB-APPENDIX I 6

WOOLLEN AND WORSTED FABRICS

	1959		1960		1961	
	Sq. Yds.	Value £	Sq. Yds.	Value £	Sq. Yds.	Value £
Total:	1,018,480	500,679	1,552,225	759,658	1,609,655	645,171
of which						
United Kingdom	443,087	184,280	606,738	235,514	805,325	343,919
South Africa	476,973	294,665	804,126	476,126	532,225	201,893
Belgium	3,767	1,846	12,558	6,380	8,847	4,335
Czechoslovakia	999	540	4,470	2,341	2,309	1,209
Italy	81,954	14,408	81,981	22,470	138,574	40,171
Poland	—	—	20	12	40,991	19,185
Switzerland	505	307	1,489	1,207	968	513
Japan	5,655	1,626	29,032	9,432	10,073	4,626
Argentina	—	—	3,153	1,298	—	—
Uruguay	3,710	1,554	5,972	3,193	60,636	25,073

SUB-APPENDIX I 7

RAYON FABRICS

	1959		1960		1961	
	Sq. Yds.	Value £	Sq. Yds.	Value £	Sq. Yds.	Value £
Total:	26,155,396	2,079,105	30,225,980	2,468,049	43,618,203	3,178,945
of which						
United Kingdom	10,193,218	866,697	5,248,391	535,461	7,092,773	700,288
Australia	19,556	2,351	2,066	191	1,535	327
South Africa	105,180	14,549	128,691	11,398	34,173	5,569
India	209,560	10,516	106,260	7,495	1,620,765	97,669
Hong Kong	654,565	35,101	441,344	26,340	510,578	27,170
Austria	289,814	22,776	652,550	58,437	120,686	14,218
Belgium	319,074	30,510	784,082	66,719	474,701	37,293
Czechoslovakia	1,960,693	107,417	3,457,170	199,470	2,067,741	131,602
France	85,994	13,395	82,327	16,297	40,958	10,439
German Federal Republic	2,165,226	199,861	5,161,356	470,308	7,175,989	626,461
Netherlands	1,662,936	140,767	2,183,936	186,320	2,726,382	224,961
Italy	873,078	92,140	771,517	96,040	309,756	50,237
Poland	—	—	24,440	1,966	855,976	49,012
Portuguese Possessions, n.e.s.	—	—	248,412	13,859	2,107,379	105,986
Spain	—	—	189,247	14,648	976,901	65,582
Switzerland	202,723	17,344	95,941	14,869	42,154	10,925
China	113,321	3,144	202,034	9,369	1,584,258	48,895
Israel	20,601	2,127	5,567	316	24,322	3,165
Japan	7,219,225	505,253	10,198,283	690,581	15,411,855	906,649
United States	56,122	13,334	223,272	45,780	385,086	57,539

SUB-APPENDIX I 8

BLANKETS AND RUGS

	1959 Value £	1960 Value £	1961 Value £
Total:	217,875	242,545	277,450
of which			
United Kingdom	56,262	79,166	120,127
South Africa	131,834	123,650	77,774
Belgium	966	1,180	1,809
German Federal Republic	233	1,624	1,737
Italy	27,060	32,502	69,808
United States	87	3,767	3,836

SUB-APPENDIX I 9

TOWELS, LINEN AND ARTICLES FOR FURNISHING N.E.S.

	1959 Value £	1960 Value £	1961 Value £
Total:	646,402	593,957	700,806
of which:			
United Kingdom	416,477	392,301	436,038
South Africa	53,645	34,194	37,280
India	145,604	117,846	151,201
Hong Kong	5,864	2,922	4,310
Austria	510	1,422	355
Czechoslovakia	2,255	1,206	4,663
France	7	4,724	13,916
German Federal Republic	2,901	5,483	4,757
Netherlands	11,541	16,411	15,720
Italy	2,390	2,519	6,480
Portugal	338	1,195	292
Spain	—	1,418	6,721
Switzerland	1,217	2,007	288
China	844	2,911	3,927
United States	872	3,610	8,736

SUB-APPENDIX I 10

CARPETS AND MATS OF TEXTILES FIBRES

	1959 Value £	1960 Value £	1961 Value £
Total:	372,035	305,347	266,826
of which			
United Kingdom	203,968	186,413	165,069
South Africa	93,916	51,815	16,100
India	6,919	6,834	5,507
Pakistan	1,255	1,515	3,302
Austria	2,194	946	2,122
Belgium	26,949	25,235	29,788
German Federal Republic	1,114	539	250
Italy	8,967	10,923	11,402
Switzerland	1,317	—	4,061
Afganistan	1,816	2,032	3,026
Iran	15,938	15,384	21,261
United States	1,215	154	149

SUB-APPENDIX I 11

ENAMELWARE AND HOLLOWARE

	1959 Value £	1960 Value £	1961 Value £
Total:	410,390	222,253	214,051
of which			
United Kingdom	113,882	71,486	74,339
South Africa	222,442	104,207	84,865
India	10,161	5,597	3,580
Hong Kong	26,381	10,465	15,032
Kenya	13,093	13,276	17,140
Tanganyika	1,248	986	49
Czechoslovakia	5,619	2,664	2,700
France	1,059	318	104
German Federal Republic	3,292	4,091	3,850
Netherlands	2,743	1,986	2,672
Italy	2,065	874	1,399
Sweden	2,157	1,420	2,037
Japan	—	1,158	58
United States	2,288	870	1,488

SUB-APPENDIX I 12

SEWING MACHINES, DOMESTIC, COMPLETE

	1959 (a)		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	6,863	175,959	14,666	294,948	16,180	283,970
of which						
United Kingdom	3,662	92,538	11,548	211,873	13,655	219,042
South Africa	434	10,946	155	2,865	144	2,647
India	235	2,025	80	639	35	288
Czechoslovakia	152	1,545	57	445	31	188
German Federal Repblic	418	14,637	452	11,152	822	17,994
Italy	1,355	31,567	1,590	45,139	660	22,744
Sweden	179	5,699	256	7,112	229	5,898
Switzerland	253	9,475	461	15,054	574	14,730
Japan	24	3,734	1	45	6	126
United States	64	1,803	4	109	10	130

(a) Includes parts.

SUB-APPENDIX I 13

TELEVISION RECEIVERS

	1960		1961	
	No. of Sets	Value £	No. of Sets	Value £
Total:	10,229	429,066	28,530	1,012,605
of which				
United Kingdom	5,139	202,183	11,484	412,480
German Federal Republic	3,710	171,963	5,526	268,176
Netherlands	1,311	51,486	9,739	278,794
Italy	32	1,482	1,163	21,648
United States	29	1,352	129	5,522

SUB-APPENDIX I 14

RADIOS AND RADIOGRAMS

	1959		1960		1961	
	No. of Sets	Value £	No. of Sets	Value £	No. of Sets	Value £
Total:	13,961	204,107	12,859	170,950	16,277	177,437
of which						
United Kingdom	4,879	70,157	3,087	37,829	5,327	69,558
South Africa	2,192	34,617	432	10,704	728	10,301
Hong Kong	—	—	854	4,865	2,076	11,653
Austria	1	20	274	3,142	111	1,298
German Federal Republic	3,380	61,381	3,714	58,640	3,676	43,721
Netherlands	3,073	28,017	3,499	42,846	2,983	25,632
Norway	100	1,528	57	1,080	39	512
United States	115	4,292	482	6,687	517	7,408

SUB-APPENDIX I 15

RADIO AND TELEVISION SPARES

	1959 Value £	1960 Value £	1961 Value £
Total:	523,949	728,930	909,464
of which			
United Kingdom	292,841	420,118	463,729
Australia	5,141	23	650
South Africa	73,895	53,181	9,162
Denmark	4,835	4,463	4,128
France	3,105	9,212	13,807
German Federal Republic	29,913	50,866	77,995
Netherlands	52,832	140,411	212,112
Italy	7,514	23,376	33,130
Sweden	3,466	1,361	499
Switzerland	176	1,295	1,286
Japan	5	6,681	68,188
United States	49,758	16,643	19,456

SUB-APPENDIX I 16

DOMESTIC ELECTRICAL EQUIPMENT N.E.S., INCLUDING PARTS, N.E.S. (EXCLUDING REFRIGERATORS, STOVES, VACUUM CLEANERS, WASHING MACHINES)

	1959 Value £	1960 Value £	1961 Value £
Total:	130,002	207,606	180,344
of which			
United Kingdom	71,534	112,068	101,027
Australia	2,933	4,932	3,879
South Africa	11,010	19,705	23,856
Hong Kong	343	1,028	808
Denmark	2,713	6,190	2,882
France	492	5,616	3,454
German Federal Republic	16,072	13,890	14,573
Netherlands	652	4,781	3,849
Italy	2,920	4,599	2,461
Sweden	4,451	7,255	6,643
United States	15,767	26,461	14,905

SUB-APPENDIX I 17

BICYCLES

	1959		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	97,140	921,842	129,484	1,191,117	109,830	1,027,754
of which						
United Kingdom	91,336	863,423	128,767	1,181,641	108,555	1,014,467
South Africa	5,515	56,127	513	7,932	523	8,822
Belgium	115	1,123	35	369	12	140

SUB-APPENDIX I 18

BICYCLE PARTS

	1959 Value £	1960 Value £	1961 Value £
Total:	363,064	419,155	418,142
of which			
United Kingdom	242,748	259,829	256,952
South Africa	36,853	34,343	23,906
Hong Kong	4,104	2,032	4,299
Belgium	1,032	1,257	2,281
Czechoslovakia	15,855	27,112	39,038
France	11,893	20,109	21,680
German Federal Republic	40,284	54,208	49,278
Netherlands	3,844	6,484	6,348
Italy	5,330	13,266	11,763

SUB-APPENDIX I 19

STOCKINGS AND HOSE

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	n.a.	563,224	3,279,698	517,965	3,087,105	488,544
of which						
United Kingdom	,,	254,095	1,340,132	247,396	1,290,995	249,372
South Africa	,,	206,135	898,850	176,587	761,514	143,681
India	,,	2,595	21,564	2,923	68,320	4,562
Malta	,,	1,278	38,961	6,866	13,860	3,412
Hong Kong	,,	23,669	442,887	13,905	421,666	13,526
France	,,	6,115	31,569	6,602	44,564	6,791
German Federal Republic	,,	7,454	42,016	7,211	49,445	8,509
Italy	,,	19,965	189,690	19,461	200,884	18,515
Switzerland	,,	2,010	14,961	2,881	8,640	2,165
Israel	,,	36,955	201,125	25,457	187,026	32,388
United States	,,	1,394	41,105	6,360	18,418	2,747

SUB-APPENDIX I **20**

OUTER GARMENTS

	1959 Value £	1960 Value £	1961 Value £
Total:	2,768,034	2,643,488	2,546,729
of which			
United Kingdom	792,032	776,647	740,405
Ireland	1,217	2,448	3,002
South Africa	1,781,841	1,665,206	1,504,240
India	14,287	12,518	8,605
Hong Kong	98,879	66,573	89,702
British West Indies	1,270	626	—
Austria	4,268	2,515	4,245
Belgium	1,429	654	205
Denmark	1,506	1,252	2,151
France	4,427	5,362	13,177
German Federal Republic	7,492	9,901	16,158
Netherlands	2,338	4,858	16,888
Italy	20,547	16,286	30,491
Portugal	1,390	1,760	3,376
Madeira	2,093	4,242	2,784
Switzerland	19,431	24,808	14,894
Israel	1,197	4,281	2,867
United States	9,945	39,352	88,344

SUB-APPENDIX I **21**

SHIRTS

	1959		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	969,240	647,611	554,780	433,060	437,577	374,134
of which						
United Kingdom	88,551	89,302	72,079	68,745	102,788	109,789
South Africa	672,978	492,882	411,958	333,460	252,353	208,581
Hong Kong	188,917	50,432	43,141	11,879	31,497	10,394
France	747	550	1,931	1,299	3,408	3,636
Italy	5,964	5,437	6,533	4,493	5,347	4,937
Switzerland	4,644	6,342	6,147	6,249	5,246	6,688
Israel	2	2	4,408	1,335	3,730	1,671
United States	1,275	273	4,402	2,778	26,126	24,165

SUB-APPENDIX I 22

PULLOVERS AND JERSEYS

	1959		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	707,824	337,803	833,117	473,289	773,315	560,251
of which						
United Kingdom	284,846	183,152	311,599	256,797	365,105	341,665
Ireland	1,915	1,275	1,757	1,082	149	385
South Africa	63,460	58,462	83,837	84,978	60,569	72,563
India	60,268	14,040	105,812	26,544	60,482	21,650
Hong Kong	240,325	43,056	245,427	37,914	179,593	22,817
Austria	1,937	1,218	2,573	1,260	2,278	2,095
Belgium	3,209	1,814	5,738	3,682	2,164	3,258
France	10,599	8,368	15,760	11,254	23,424	22,541
German Federal Republic	5,474	2,867	15,598	6,800	16,146	9,989
Netherlands	4,720	3,084	2,022	2,056	3,130	3,202
Italy	21,954	15,670	25,356	27,774	32,409	37,674
Switzerland	3,449	2,774	3,665	4,993	6,700	9,323
United States	154	38	4,180	4,154	9,666	9,194

SUB-APPENDIX I 23

SINGLETS, VESTS AND T. SHIRTS

	1959		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	622,446	75,167	568,780	74,478	605,697	78,908
of which						
United Kingdom	229,112	30,560	231,926	33,312	258,662	39,917
Canada	581	563	1,410	1,433	2,741	2,222
South Africa	146,160	23,776	92,077	18,402	64,471	14,040
Hong Kong	204,465	16,230	198,486	15,003	236,714	15,805
Italy	8,266	794	14,854	1,240	16,831	1,527
Switzerland	7,747	1,272	8,993	1,778	6,068	1,048
Israel	12,420	761	13,824	1,335	1,296	155

SUB-APPENDIX I 24

OTHER UNDERCLOTHING

	1959 Value £	1960 Value £	1961 Value £
Total:	604,543	636,605	657,461
of which			
United Kingdom	118,781	127,070	143,531
South Africa	414,701	417,882	376,484
India	1,300	1,082	387
Hong Kong	26,546	16,569	19,433
British West Indies	15,454	8,275	1,404
Denmark	3,149	2,657	2,869
France	3,324	3,622	8,558
German Federal Republic	11,632	22,610	34,516
Italy	3,579	4,104	8,715
Switzerland	2,554	1,227	3,165
Israel	9	1,169	445
United States	2,656	29,197	54,523

SUB-APPENDIX I 25

OTHER CLOTHING

	1959 Value £	1960 Value £	1961 Value £
Total:	583,254	436,318	392,510
of which			
United Kingdom	210,663	151,612	156,586
South Africa	316,106	236,231	179,199
India	7,171	5,556	3,953
Hong Kong	10,874	7,667	11,149
Denmark	1,077	3,074	2,537
France	3,516	3,845	5,029
German Federal Republic	8,184	10,999	12,462
Netherlands	1,465	2,308	1,782
Italy	3,237	1,550	2,428
Portugal	1,172	1,380	2,836
Madeira	4,874	2,140	1,385
Switzerland	4,308	2,097	2,551
Israel	1,450	1,006	548
United States	1,227	4,912	7,926

SUB-APPENDIX I 26(i)

FOOTWEAR, CANVAS

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	101,097	30,672	116,877	40,115	71,880	25,755
of which						
United Kingdom	12,597	4,640	6,100	3,219	6,652	3,974
South Africa	53,656	19,380	74,835	30,460	41,491	16,366
India	4,623	1,156	12	2	1,320	365
Hong Kong	13,281	3,056	15,365	3,463	21,495	4,678
Czechoslovakia	16,264	2,214	19,430	2,356	—	—

SUB-APPENDIX I **26 (ii)**

FOOTWEAR, MEN'S AND BOYS', WHOLLY OR MAINLY LEATHER

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	533,589	786,367	460,145	667,959	428,870	668,355
of which						
United Kingdom	109,831	164,949	74,863	120,920	86,759	149,092
South Africa	376,365	585,841	315,658	494,679	286,572	461,687
India	22,775	7,306	25,427	6,299	6,303	2,007
Belgium	821	1,198	4	11	—	—
France	6,737	5,537	23,662	23,612	32,120	33,686
German Federal Republic	752	1,201	1,242	2,184	1,688	3,015
Netherlands	1,478	997	306	114	15	34
Italy	11,139	15,715	13,887	15,758	12,449	16,125
Switzerland	253	1,067	155	709	—	—

SUB-APPENDIX I **26 (iii)**

FOOTWEAR,WOMEN'S AND GIRLS', WHOLLY OR MAINLY LEATHER

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total	484,408	634,093	498,327	637,986	426,069	583,853
of which						
United Kingdom	72,027	102,870	66,943	108,196	73,322	132,625
South Africa	374,497	495,387	379,590	486,697	314,503	412,003
India	638	518	5,944	2,177	8,621	2,458
France	19,860	13,090	24,040	17,794	10,797	7,752
Netherlands	36	35	7,701	4,039	62	37
Italy	15,740	19,248	11,559	17,006	15,937	24,905
Switzerland	303	1,092	204	780	466	1,677

SUB-APPENDIX I **26 (iv)**

SLIPPERS N.E.S.

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	151,208	54,180	151,182	52,783	172,632	57,146
of which						
United Kingdom	28,146	14,861	26,043	14,993	37,586	20,812
South Africa	81,245	29,959	77,218	29,076	69,226	25,508
India	6,497	2,409	10,593	3,047	3,238	1,014
Hong Kong	28,988	3,442	32,598	3,528	55,828	6,523
Netherlands	2,051	1,155	332	158	1,209	912
Italy	2,150	1,996	2,274	1,181	1,876	968

SUB-APPENDIX I **26 (v)**

INFANTS' FOOTWEAR

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	63,933	31,347	92,187	38,339	52,173	7,350
of which						
United Kingdom	36,704	13,816	62,796	26,170	38,918	4,625
South Africa	25,133	16,819	20,017	10,738	6,722	1,946
Hong Kong	—	—	8,400	1,084	6,420	751

SUB-APPENDIX I **26 (vi)**

SANDALS, N.E.S.

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	102,697	54,611	115,438	62,150	181,892	90,177
of which						
United Kingdom	32 831	19,094	11,842	9,573	44,370	23,656
South Africa	48,787	26,588	66,512	37,178	67,581	42,533
India	11,777	4,328	14,392	5,018	38,058	13,778
France	600	447	14,011	7,189	6,212	2,224
Italy	4,186	2,676	3,238	2,330	5,061	3,536

SUB-APPENDIX I **26 (vii)**

FOOTWEAR, N.E.S.

	1959		1960		1961	
	Pairs	Value £	Pairs	Value £	Pairs	Value £
Total:	285,546	187,688	219,192	172,458	337,559	221,890
of which						
United Kingdom	79,567	75,210	79,974	90,107	128,112	121,837
South Africa	158,745	98,294	87,683	65,967	104,969	71,030
Hong Kong	30,849	4,784	34,420	5,368	44,090	6,613
Czechoslovakia	3,807	1,769	1,336	680	1,130	537
France	3,607	1,536	6,479	3,700	10,263	6,081
German Federal Republic	331	236	2,304	2,218	1,515	2,414
Italy	5,222	4,461	5,195	3,747	2,914	1,477

SUB-APPENDIX I 27

WATCHES AND PARTS

	1959		1960		1961	
	Number	Value £	Number	Value £	Number	Value £
Total:	n.a.	223,359	105,733	234,336	142,195	296,174
of which						
United Kingdom	,,	13,064	5,246	14,284	12,609	18,064
Canada	,,	13,166	5,490	6,063	7,414	8,095
South Africa	,,	2,128	220	660	313	940
France	,,	27,187	18,356	21,879	29,777	31,519
Morocco	,,	1,023	1,050	838	—	—
German Federal Republic	,,	13,124	8,444	21,477	9,072	18,517
Switzerland	,,	152,140	63,607	164,341	80,879	216,146
United States	,,	523	210	1,174	124	896

SUB-APPENDIX I 28

JEWELLERY, INCLUDING IMITATION

	1959 Value £	1960 Value £	1961 Value £
Total:	266,063	270,917	248,740
of which			
United Kingdom	90,673	98,277	94,319
South Africa	92,868	87,380	64,782
India	4,394	2,938	3,628
Hong Kong	2,359	1,698	4,570
Austria	5,413	3,673	5,437
Czechoslovakia	11,502	14,326	11,680
France	2,522	3,567	5,092
German Federal Republic	45,779	41,287	38,033
Italy	4,110	5,362	5,872
Switzerland	3,084	4,559	2,523
United States	602	4,938	7,548

APPENDIX J

PRICE RANGES OF CLOTHING PURCHASED BY AFRICANS IN THE EIGHT MAJOR TOWNS OF NORTHERN RHODESIA (1960)

A. MEN'S CLOTHING AND FOOTWEAR

Item	Price Range	Percentage of Purchases at each price
	£ s. d. £ s. d.	%
Shirts	Up to 7 6	4
	7 7 to 10 0	6
	10 1 to 12 6	6
	12 7 to 15 0	12
	15 1 to 17 6	12
	17 7 to 1 0 0	11
	1 0 1 to 1 2 6	10
	1 2 7 to 1 5 0	12
	1 5 1 to 1 7 6	10
	1 7 7 to 1 10 0	6
	1 10 1 and over	11
	TOTAL:	100
Trousers not Khaki	Up to 1 10 0	10
	1 10 1 to 2 0 0	16
	2 0 1 to 2 10 0	10
	2 10 1 to 3 0 0	12
	3 0 1 to 3 10 0	9
	3 10 1 to 4 0 0	8
	4 0 1 to 4 10 0	5
	4 10 1 to 5 0 0	12
	5 0 1 to 5 10 0	14
	5 10 1 to 6 0 0	3
	TOTAL:	100
Khaki Trousers	Up to 15 0	9
	15 1 to 1 0 0	18
	1 0 1 to 1 5 0	28
	1 5 1 to 1 10 0	21
	1 10 1 to 1 15 0	6
	1 15 1 to 2 0 0	12
	2 0 1 and over	6
	TOTAL:	100
Jackets	Up to 1 0 0	8
	1 0 1 to 1 10 0	24
	1 10 1 to 2 0 0	28
	2 0 1 to 2 10 0	32
	2 10 1 and over	8
	TOTAL:	100

Item	Price Range	Percentage of Purchases at each price
	£ s. d. £ s. d.	%
Shorts	Up to 7 6	12
	7 7 to 10 0	13
	10 1 to 12 6	25
	12 7 to 15 0	13
	15 1 to 17 6	9
	17 7 to 1 0 0	11
	1 0 1 to 1 2 6	2
	1 2 7 to 1 5 0	4
	1 5 1 and over	11
	TOTAL:	100
Jerseys	Up to 10 0	17
	10 1 to 15 0	13
	15 1 to 1 0 0	17
	1 0 1 to 1 5 0	22
	1 5 1 to 1 10 0	5
	1 10 1 to 1 15 0	4
	1 15 1 to 2 0 0	9
	2 0 1 and over	13
	TOTAL:	100
Leather Shoes	Up to 1 0 0	13
	1 0 1 to 1 5 0	9
	1 5 1 to 1 10 0	17
	1 10 1 to 1 15 0	13
	1 15 1 to 2 0 0	9
	2 0 1 to 2 5 0	6
	2 5 1 to 2 10 0	8
	2 10 1 to 2 15 0	9
	2 15 1 to 3 0 0	7
	3 0 1 and over	9
	TOTAL:	100
Canvas Shoes	Up to 7 6	20
	7 7 to 10 0	27
	10 1 to 12 6	43
	12 7 to 15 0	6
	15 1 and over	4
	TOTAL:	100

B. WOMEN'S CLOTHING AND FOOTWEAR

Item	Price Range	Percentage of Purchases at each price
	£ s. d. £ s. d.	%
Dresses	Up to 10 0	8
	10 1 to 15 0	13
	15 1 to 1 0 0	16
	1 0 1 to 1 5 0	15
	1 5 1 to 1 10 0	18
	1 10 1 to 1 15 0	11
	1 15 1 to 2 0 0	7
	2 0 1 to 2 5 0	3
	2 5 1 to 2 10 0	4
	2 10 1 and over	5
	TOTAL:	100
Petticoats	Up to 5 0	11
	5 1 to 7 6	16
	7 7 to 10 0	13
	10 1 to 12 6	20
	12 7 to 15 0	11
	15 1 to 17 6	10
	17 7 to 1 0 0	6
	1 0 1 to 1 2 6	6
	1 2 7 and over	7
	TOTAL:	100
Blouses	Up to 5 0	13
	5 1 to 7 6	31
	7 7 to 10 0	17
	10 1 to 12 6	13
	12 7 to 15 0	13
	15 1 and over	13
	TOTAL:	100
Skirts	Up to 10 0	10
	10 1 to 15 0	17
	15 1 to 1 0 0	17
	1 0 1 to 1 5 0	17
	1 5 1 to 1 10 0	17
	1 10 1 to 1 15 0	5
	1 15 1 and over	17
	TOTAL:	100
Canvas Shoes	Up to 7 6	24
	7 7 to 10 0	38
	10 1 to 12 6	22
	12 7 to 15 0	16
	TOTAL:	100

C. CHILDREN'S CLOTHING

Item	Price Range	Percentage of Purchases at each price
	£ s. d. £ s. d.	%
Dresses	Up to 2 6	2
	2 7 to 5 0	18
	5 1 to 7 6	27
	7 7 to 10 0	22
	10 1 to 12 6	10
	12 7 to 15 0	10
	15 1 to 17 6	8
	17 7 to 1 0 0	3
	TOTAL:	100
Shirts	Up to 2 6	7
	2 7 to 5 0	36
	5 1 to 7 6	25
	7 7 to 10 0	23
	10 1 to 12 6	6
	12 7 and over	3
	TOTAL:	100
Shorts	Up to 2 6	5
	2 7 to 5 0	35
	5 1 to 7 6	26
	7 7 to 10 0	22
	10 1 to 12 6	8
	12 7 and over	4
	TOTAL:	100
Jerseys	Up to 3 0	6
	3 1 to 6 0	60
	6 1 to 9 0	7
	9 1 to 12 0	7
	12 1 and over	20
	TOTAL:	100
Canvas Shoes	Up to 2 6	5
	2 7 to 5 0	42
	5 1 to 7 6	33
	7 7 to 10 0	7
	10 1 to 12 6	11
	12 7 and over	2
	TOTAL:	100

APPENDIX K

GROWTH OF OUTPUT OF CERTAIN MANUFACTURING INDUSTRIES IN THE FEDERATION (1955-1959)

Industries	Year	Number of Establishments	Gross Output £'000
TOTAL MANUFACTURING INDUSTRIES	1955	1,003	94,189
	1956	1,031	107,584
	1957	1,267	129,410
	1958	1,321	134,296
	1959	1,319	146,021
MANUFACTURING:			
Dairy Products (excluding bottling and pasteurizing of milk)	1955	10	439
	1956	13	682
	1957	14	986
	1958	17	1,345
	1959	14	1,328
Grain Mill Products . . .	1955	41	9,380
	1956	43	10,387
	1957	57	13,174
	1958	49	12,548
	1959	44	12,450
Bakery Products . . .	1955	48	3,552
	1956	53	3,719
	1957	73	4,664
	1958	77	5,066
	1959	86	5,647
Miscellaneous Food Preparations	1955	15	5,053
	1956	15	5,716
	1957	21	6,595
	1958	22	6,674
	1959	23	7,594
Alcohol, Beer and Spirits .	1955	16	2,520
	1956	15	3,729
	1957	16	4,464
	1958	22	5,650
	1959	30	6,877
Tobacco Manufactures, Commercial Grading and Packing of Tobacco	1955	51	4,723
	1956	50	6,717
	1957	63	6,442
	1958	58	6,855
	1959	51	7,268
Spinning, Weaving and Finishing of Textiles, and Manufacture of Twine, Rope and Cordage	1955	22	5,951
	1956	21	6,444
	1957	27	7,082
	1958	26	6,611
	1959	26	7,769
Wearing Apparel and Footwear	1955	62	5,612
	1956	62	6,345
	1957	90	8,049
	1958	99	8,108
	1959	100	9,839
Furniture and Fixtures regardless of materials used	1955	35	2,060
	1956	34	2,167
	1957	63	3,089
	1958	59	3,022
	1959	67	3,369
Soaps and Candles . . .	1955	8	1,711
	1956	7	1,996
	1957	7	2,192
	1958	8	2,319
	1959	11	2,545
Chemicals and Chemical Products including Fertilizers	1955	19	3,798
	1956	22	3,393
	1957	32	4,099
	1958	41	5,235
	1959	33	6,724

APPENDIX L

IMPORTS FROM CERTAIN COUNTRIES OF ORIGIN 1954-1960

£'000

	1955	1956	1957	1958	1959	1960	Jan-Sept 1961
Total	138,574	159,266	177,454	157,634	150,150	156,839	117,248
of which:							
United Kingdom	59,596	65,239	67,120	59,721	55,356	51,731	39,571
South Africa	46,284	54,188	61,659	49,938	51,640	52,209	36,182
Australia	2,179	1,968	2,572	2,747	2,737	2,991	2,348
Canada	2,218	2,424	2,540	2,196	1,516	2,264	1,572
India	2,732	2,399	2,179	1,415	1,043	1,126	1,492
France	512	798	998	1,214	1,587	1,953	1,649
Western Germany	2,127	3,442	4,094	5,089	4,828	6,415	5,661
Italy	1 007	1,119	2,195	2,888	1,849	1,830	1,382
Japan	332	591	850	908	1,203	1,966	1,797
Netherlands	1,628	2,026	2,722	2,334	1,601	2,445	2,160
Sweden	828	1,251	1,593	1,375	1,436	1,539	1,085
United States	6,647	9,443	10,449	7,711	6,296	9,320	6,004

APPENDIX M

RATES OF ADVERTISING AND TRANSMISSION TIMES OF FEDERAL BROADCASTING CORPORATION'S AFRICAN COMMERCIAL SERVICE

RATES

	Northern Region	Southern Region	Nyasaland Region	National
Spot packages	£28 12 0 (16 spots)	£25 (14 spots)	£7 2 6 (8 spots)	—
Spots	—	—	—	£2 13 6
Time signals	£2 13 6 each	£2 13 6 each	£1 6 9 each	£4 each

TIMES OF TRANSMISSION

	Northern Region	Southern Region	Nyasaland Region	National (whole Federation)
WEEKDAYS (Mondays thro' Saturdays)	"A" PROGRAMME	"C" PROGRAMME	"N" PROGRAMME	
NORTHERN REGION	MONDAYS AND THURSDAYS 12 noon - 7 p.m.	MONDAYS 12 noon - 9.00 p.m.	MONS., TUES., THURS., FRIDAYS 6.40 p.m. - 7.50 p.m.	MONS., TUES., WEDS. 6.00 a.m. - 8.00 a.m.
"A" PROGRAMME covers Bemba and Nyanja languages	TUESDAYS, WEDNESDAYS AND FRIDAYS 12 noon - 7.50 p.m.	TUESDAYS, FRIDAYS, SATURDAYS 12 noon - 8.00 p.m.	WEDNESDAYS 6.15 p.m. - 7.50 p.m.	THURSDAYS 6.00 a.m. - 8.00 a.m. 8.15 p.m. - 9.00 p.m.
"B" PROGRAMME covers Tonga, Lozi, Lunda and Luvale languages	SATURDAYS 12 noon - 8.00 p.m.	WEDNESDAYS 12 noon - 8.30 p.m.	SATURDAYS 6.05 p.m. - 7.50 p.m.	FRIDAYS 6.00 a.m. - 8.00 a.m. 8.15 p.m. - 8.30 p.m.
SOUTHERN REGION	"B" PROGRAMME MONDAYS, TUESDAYS WEDNESDAYS AND FRIDAYS 4.00 p.m. - 8.50 p.m.	THURSDAYS 12 noon - 6.40 p.m.		SATURDAYS 6.00 a.m. - 8.00 a.m. 8.30 p.m. - 9.00 p.m.
"C" PROGRAMME covers Shona, Ndebele, Nyanja				
NYASALAND REGION				
"N" PROGRAMME covers Nyanja and Tumbuka	THURSDAYS AND SATURDAYS 4.00 p.m. - 9.00 p.m.			

INFORMATION FOR UNITED KINGDOM EXPORTERS

Trade Commissioner's Address

The address of the Principal British Trade Commissioner in Rhodesia and Nyasaland is P.O. Box 984, R.T.A. House, Baker Avenue, Salisbury, Southern Rhodesia.

Hints to Businessmen

This is a series of booklets, prepared by the Board of Trade, giving useful information on overseas markets. In the booklet on the Federation of Rhodesia and Nyasaland, details are given on travel, taxation, principal towns, hours of business and innumerable other items which a businessman visiting the Federation might need to know. Copies of this, and other booklets in the same series, may be obtained from the Directories and Notices Section, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone: Trafalgar 8855, extn. 2928).

Export Opportunities

Details of inquiries for United Kingdom products by overseas buyers, contracts open for tender, and agents wishing to represent United Kingdom firms, are published each week in the *Board of Trade Journal* under the heading 'Information for United Kingdom Exporters'. Fuller information is also provided in the *Export Service Bulletin*, which is published three times a week, with a weekly supplement, by the Export Services Branch of the Board of Trade, Hillgate House, 35, Old Bailey, London, E.C.4. (Telephone: City 5757).

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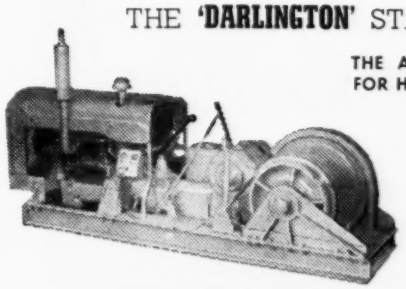

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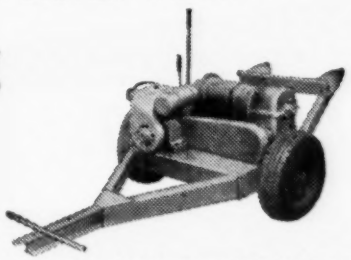

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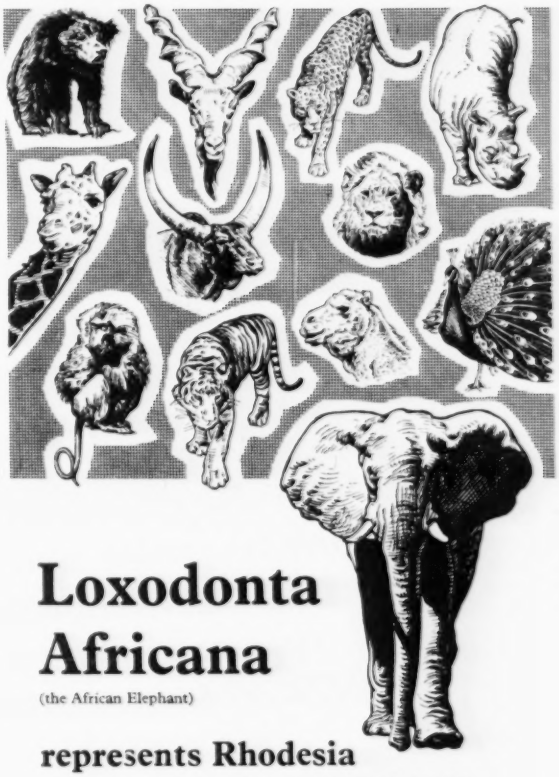

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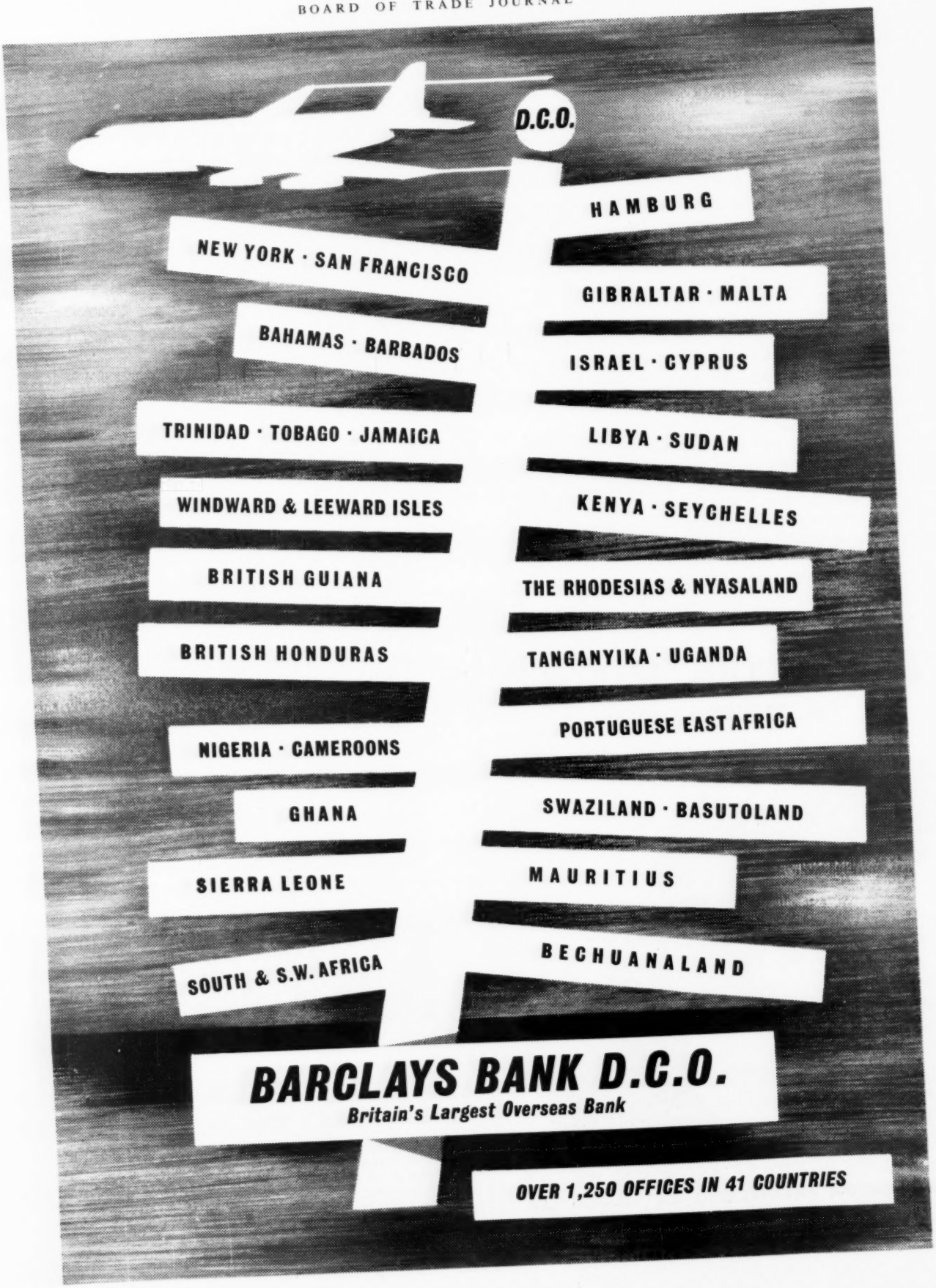
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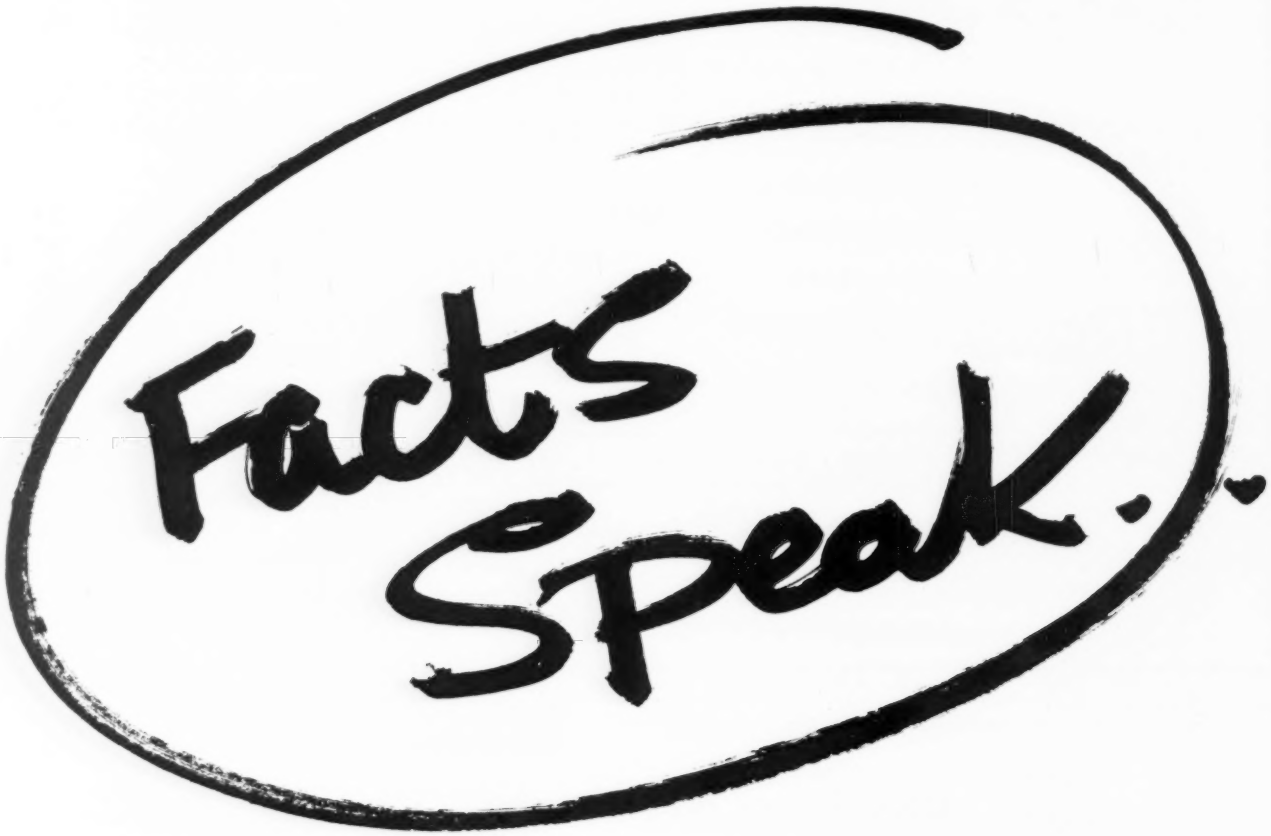

In reply to a recent questionnaire sent out by the British Institute of Management to selected companies as to the sources from which their commercial information was obtained, the *Board of Trade Journal* took second highest place amongst the **38** journals mentioned.

Inquiries

If within the London Postal Area

Advertisement Section, H.M. Stationery Office, Room D. 63, Atlantic House, Holborn Viaduct, London, E.C.1. CITy 9876 (Ext. 147 and 148)

If outside the London Postal Area

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Trade Fairs and Exhibitions at Home and Overseas

Changes in Trade Fairs and Exhibitions Announcements

BECAUSE of pressure on space all the various classified lists of trade fairs and exhibitions will be published in full only on the dates indicated below:

	Date Last Published	Date Next Published
Europe	Sept. 7	Dec. 7
United Kingdom	Aug. 3	Nov. 2
Outside Europe	July 6	Oct. 5

Amendments and additions to the three lists will be shown in the issues of the intervening weeks.

No responsibility is taken for the standing of organizations or individuals mentioned in the lists, and dates, etc., may be subject to alteration.

The Board of Trade Export Publicity and Fairs Branch, Horse Guards Avenue, London, S.W.1 (Telephone: Trafalgar 8855, Extension 3096 Europe; 3097 United Kingdom and outside Europe) will be glad to answer general inquiries but application should be made to the organizers or United Kingdom agents for details of costs and conditions of participation. Export Publicity and Fairs Branch can also provide information about other events, which, owing to space limitation, are not included in the lists.

* indicates fair which is held annually at approximately the time stated.

† indicates fair which is held in alternate years at approximately the time stated.

Additions to Classified Lists of Trade Fairs and Exhibitions

THE FAIRS and exhibitions given below are additions to the full lists published in the *Board of Trade Journal* on July 6, August 3, and September 7 respectively.

EUROPE

No change

UNITED KINGDOM

Addition:

BUILTH WELLS: ROYAL WELSH SHOW – July 23-25, 1963.
* Apply, The Secretary, Royal Welsh Agricultural Society, Queen's Road, Aberystwyth.

OUTSIDE EUROPE

Addition:

TORONTO: CANADIAN CLEANERS AND LAUNDERERS ALLIED TRADES ASSOCIATION 2ND INTERNATIONAL TRADE SHOW – June 4-8, 1963.
At Industry Building, Exhibition Park. Apply, Canadian Cleaners and Launderers Allied Trades Association, 11 Adelaide Street West, Toronto, 1, Ontario.

Visits Overseas by U.K. Businessmen

United Kingdom businessmen travelling overseas are urged, in their own interest, to give advance notice of Trade Commissioners and Foreign Service Officers if they propose to call on them, especially if it is intended to ask for information or other help which it may take time to prepare. It is often advisable to telephone for an appointment on arrival.

Export Services Branch and the Regional Offices of the Board of Trade, if approached, will pass information about pending business visits to Overseas Officers and provide letters of introduction.

Consumer Goods on Show at St. Erik's Fair

THE TWENTIETH St. Erik's Fair was opened by the Prime Minister of Sweden on August 29 in the theatre which was constructed in the grounds for the British Exhibition of last May. This is the twentieth, consecutive, annual St. Erik's Fair and the celebration of the jubilee brought a number of exhibition officials to Stockholm from several European countries.

This year was the first time that the old premises had been abandoned; the whole exhibition was displayed in the splendid new hall which has more than 200,000 sq. ft. of floor space, all on the ground level with the exception of a small mezzanine floor. Also for the first time the Fair was divided into two section. After St. Erik's Fair, which is now limited to consumers' goods and which closed on September 9, the Stockholm Technical Fair, for machinery and other capital goods, will be held in the same hall, opening on September 29. The former was open to the public, the Technical Fair only to the trade.

The St. Erik's Fair was distinguished by the unusually large number of national exhibitions. Special displays were mounted by twenty-one countries, Austria, Belgium, Brazil, Bulgaria, Cyprus, Denmark, Finland, Guatemala, Israel, Italy, Japan, Korea, Morocco, The Netherlands, Pakistan, Poland, Switzerland, Thailand, Czechoslovakia, The Federal German Republic and East Germany. Most of these displays were distinguished by a high standard of presentation They occupied about half of the space.

Two Commonwealth Countries participated for the first time, Pakistan and Cyprus, both of which find a growing interest for their products in the Swedish market. Several of the national displays were on a large scale and presented a comprehensive range of national products. Noticeable in this respect were the displays of the Federal Republic of Germany, Poland, Israel and Korea. Others concentrated on particular lines. The Italian display of wines and foodstuffs particularly attracted attention. The Dutch stand was limited to showing cheese and potato products. The Swiss section was outstanding for the high quality of the goods shown, watches and textiles, and attracted a good deal of public attention by dispensing edible products at attractive small booths.

In the space allocated to the commercial exhibitors, household goods were the major exhibits. In view of the tremendous effort made by British exhibitors at the British Exhibition in Stockholm in May, 1962, it was not surprising to find that British participation was limited but there were some good displays of electrical appliances, especially washing machines. The outdoor space was little utilized but two British caravan firms followed up the success of caravans at the British Exhibition.

It is intended that St. Erik's Fair should be organized on the same pattern in future years with a Technical Fair following soon after St. Erik's Fair which will be devoted to consumers' goods.

B.O.T. Departments, Overseas Officers and Commercial Inquiry Officers

	Last published in Board of Trade Journal
British Commercial Representatives Overseas	10 Aug. 1962
Board of Trade Departments	3 Aug. 1962
Board of Trade, Regional Controllers	10 Aug. 1962
E.C.G.D. Local Offices	14 July 1961
British and Commonwealth Chambers of Commerce and other British Business Organizations Overseas	17 Aug. 1962
U.S. Consular Offices in the U.K.	21 July 1961

SWITZERLAND WILL BUY

but Britain must SELL

BRITISH INDUSTRIAL FAIR AND BRITISH FORTNIGHT

Switzerland is a market of rich potential for British industry. Her high rate of industrial growth, liberal trade policies, stable currency and general prosperity combine to offer excellent opportunities for the sale of British goods. In 1961, Swiss imports reached almost £1,000 million but Britain secured less than 6%. This vital market needs our vigorous attention. Tariffs are low and by November this year will be reduced to 50% for Britain and other EFTA countries.

ZÜRICH

2—14 SEPTEMBER 1963

Full details from the Organisers:—
BRITISH OVERSEAS FAIRS LTD, 21 Tothill Street, S.W.1
Tel: WHItehall 6711

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President Opens ADEX '62

ADDRESSING members of every type of advertising service and British and foreign members of professional advertising bodies, at the opening at Olympia, London, of 'ADEX', the National Advertising Services Exhibition (September 10-15), Mr. Frederick Erroll, President of the Board of Trade, said, 'It is, in my opinion, wholly appropriate that the advertising industry, like any other, should concern itself with the efficiency of its methods and to this I am sure this exhibition makes a notable contribution.'

'Many of you will be studying what the Molony Committee has had to say on the subject of advertising. Its recommendations are, of course, also being studied by the Government, and I have no doubt we shall be discussing these matters from time to time in Parliament after the Recess. There can be no doubt that advertising will be receiving to an unprecedented extent a great deal of attention, and only a little of it will be misdirected or ill-informed. It is up to the industry to make sure that its conduct can face such scrutiny. It is on this account that I have been impressed by the industry's sense of responsibility in this regard, and I have particularly welcomed the recent decision to set up an Advertising Standards Authority. I shall watch this experiment with great interest and I would like to wish it every success.'

The President went on to say that one of his principal concerns was with the vigour of Britain's export trade and that though exports had shown encouraging expansion, strong and sustained effort was needed to free the country from recurring balance of payments difficulties, and if we were to play our full part in world affairs.

The advertising service industries could themselves make a direct contribution here, and he was most interested to learn of the extent of the foreign attention that this exhibition had attracted.

'But even more important I believe that the advertising industry as a whole has a great contribution to make to the national export effort' continued the President. 'As this present exhibition bears witness, the resources of the advertising industry in this country are as efficient and highly developed as any in the world. The techniques of this industry are available to all manufacturers in the home market. I should like to be sure that equally good facilities are available to our exporters in foreign markets. I am particularly anxious that advertising agents in this country should press ahead with the good work they are doing in the improvement and extension of their connections of all kinds in overseas countries. Obviously, Western Europe is an area where there is a particularly strong case for this.

'Our trade with Western Europe in recent years has been growing faster than in any other area in the world, and so far there has been little sign of any slowing down in this remarkable rate of growth. Nevertheless, I believe that it may still be in Western Europe where an augmented sales promotion service is most needed. I need hardly say that if we join the Common Market, the opportunity that will be open to us in Europe will be enormous'.

This exhibition is organized by the World's Press News and Advertiser's Review. Foreign professional bodies such as the Finnish Association of Advertising Agencies, the American Point of Purchase Institute and members of the European Market Association of Advertising Agencies, which is holding its annual conference to coincide with the exhibition, are attending.

Men's Wear Export Drive

ON MONDAY Sir William McFadzean, chairman of the Export Council for Europe, opened 'London Line, 1963' organized by the British Men's Wear Guild at the Courtauld Fashion Theatre, Hanover Square, London, W.1.

The Guild's member companies represent a block of exports amounting to more than £10,000,000, and this men's wear fashion show, intended as a world preview for international buyers, was attended by home and overseas men's wear buyers and foreign commercial attaches, including representatives from the embassies of the United States, France, Italy, U.S.S.R., Denmark, Czechoslovakia, Austria, Switzerland and South Africa.

Official British Pavilion at Nigerian Fair

THE BOARD OF TRADE is supplying a British pavilion and organizing a display in it, with exhibits ranging from hand tools to computers, at the Nigerian International Trade Fair in Lagos, opening on October 27 and ending on November 18 (see *Board of Trade Journal* of September 7, 1962, page 521). The pavilion covers 16,000 square feet, and it will include displays by more than 30 British firms as well as official exhibits.

Exceptional use has been made of animation and the latest exhibition techniques to emphasize the message of the display in the pavilion, which is that trade and industrial co-operation between Britain and Nigeria is of mutual benefit and that Britain has a wide range of equipment to offer rapidly developing countries like Nigeria.

Four trade associations have collaborated in the organization of the pavilion and the provision of exhibits. They are the Locomotive and Allied Manufacturers' Association of Great Britain, the British Electrical and Allied Manufacturers' Association, the British Radio Equipment Manufacturers' Association and the Publishers' Association. The pavilion, the official exhibits and the stand arrangements have been designed by the Central Office of Information, who are also supervising construction.

Special features in the pavilion will include a working model of a hydro-electric scheme, a road-safety exhibit in which visitors will be able to try their own hand at driving, a duplicator producing coloured souvenir pictures of the pavilion, data and process computers answering questions about football statistics and a locomotive cab with a view through the windscreen showing it hurtling from London to Birmingham in eight minutes. Other exhibits will include a display of educational and technical books, television and radio sets, fabrics, disc brakes, industrial electrical and pumping equipment, electric power tools, air-conditioning equipment, tape-recorders and electrical generation equipment.

The Pavilion is based on an industrial-type prefabricated steel structure. Dominating the entrance will be an illuminated mural 35 feet long and 15 feet high, in coloured glass fibre, depicting the generation and distribution of electricity. The mural has been designed by the British artist Abraham Games and constructed by Leslie Spitz.

Many British firms will have their own stands, or products on agents' stands, in other parts of the fair. The Nigerian International Trade Fair is the first of its kind in West Africa. Forty-two nations, including the United States, the Soviet Union and Western Germany will be taking part. About 40,000 visitors a day are expected, including buyers from all parts of Africa. British exports to Nigeria totalled £74 million last year.

Graphic Arts Review

The 1962 Penrose Annual, a review of the graphic arts, includes articles under the following headings: 'Do children get the books they want?', 'Can printers keep pace with computer output?', and the 'Presentation of Company Accounts' Lund Humphries, London and Bradford. 42s. 0d.

The Overseas Press Can Help Exporters

A revised version of the booklet 'Overseas Press Correspondents: How they and industry can help each other' has been published by the Board of Trade. It seeks to explain to trade associations and firms how, if they are assisted by the right material and facilities, the London correspondents of overseas newspapers, magazines and broadcasting stations can disseminate information which is both of interest to their audience and of value to British exporters. Many suggestions are made as to how to set about it, and there is a full list of the names and addresses of Press correspondents in London. The booklet is being distributed to industry through a number of organizations including the Federation of British Industries, Association of British Chambers of Commerce, National Association of British Manufacturers, Incorporated Society of British Advertisers, Institute of Practitioners in Advertising and Institute of Public Relations. Copies are also available from Export Publicity and Fairs Branch, Board of Trade, Horse Guards Avenue, London, S.W.1 (Trafalgar 8855, Ext. 2764).

Overseas Trade Section

Trade and Financial Arrangements

United Kingdom and Japan: Double Taxation

A DOUBLE TAXATION Convention between the United Kingdom and Japan was signed in Tokyo on Tuesday, September 4, 1962.

The Convention, which is subject to ratification, provides for the avoidance of double taxation of income and profits and is expressed to take effect in the United Kingdom for income tax from April 6 in the calendar year in which the exchange of the instruments of ratification takes place.

The full text will be published shortly by H.M. Stationery Office.

Cyprus and the Republic of Lebanon

THE GOVERNMENT of the Republic of Cyprus has entered into a trade agreement with the Government of the Republic of Lebanon. The agreement provides for quotas of goods (details of these are not known at present by the Board of Trade) to be exchanged and for the encouragement of the tourist traffic.

Iraq and Sweden

AN ECONOMIC and Technical Co-operation Agreement was signed between Iraq and Sweden in Baghdad on June 30, 1962. Details of the Agreement can be obtained from the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone Trafalgar 8855, extension 2528.)

Methods of Industrial Development

O.E.C.D's report of the Second Conference on problems of development held near Madrid during April 1961 is now available under the title 'Methods of Industrial Development with special reference to less developed areas'. Copies: H.M. Stationery Office, P.O. Box 569, London, S.E.1. Price 30s. (by post 31s. 5d.)

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Sweden and Poland

A PROTOCOL to the Trade Agreement between Sweden and Poland was signed in Stockholm on July 12, 1962 covering trade between the two countries during the period May 1, 1962 to April 30, 1963. New quotas have been established for Polish exports of methanol, fibre board and bricks and the quotas for fruit and vegetables, fuel oil, certain chemicals, pigskins, parquet flooring and furniture have been increased. Swedish export quotas for wood pulp, ships equipment, high grade steel, leather and skins and paints and lacquers have also been increased.

Inquiries about this notice should be addressed to Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, E.C.4. (Telephone City 5757, Extension 449 or 450.)

British Trade Commissioner at Nairobi

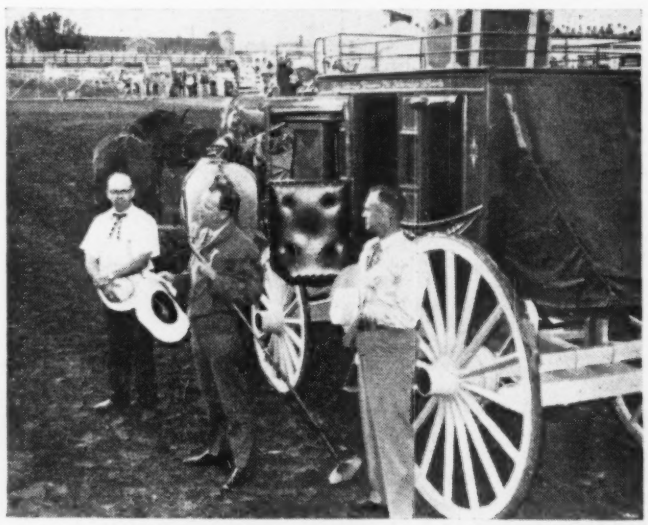
Mr. B. W. Meynell, who is at present serving as a Principal in the General Division of the Board of Trade, has been appointed as the Principal British Trade Commissioner at Nairobi.

Mr. Meynell, who succeeds Mr. C. E. Dymond, will take up his new appointment in October, 1962. Mr. Dymond is returning to Britain at the end of his tour of duty.

Export Opportunities for U.K. Traders

Details of inquiries for United Kingdom products by overseas buyers, contracts open for tender, and agents wishing to represent United Kingdom firms, are published each week in the *Board of Trade Journal* under the heading 'Information for United Kingdom Exporters'. Fuller information is also provided in the *Export Service Bulletin*, which is published three times a week, with a weekly supplement, by the Export Services Branch of the Board of Trade.

British Trade Commissioner in Alberta



Mr. G. R. Latham (centre), British Trade Commissioner in Alberta, at the opening ceremony of the Agricultural Exhibition and Stampede held in the City of Lethbridge, Southern Alberta. With him are Mr. E. C. Lonsdale (*right*), Mayor of Lethbridge, and Mr. R. C. Hill, president of the Exhibition.

Information for United Kingdom Exporters

BRIEF DETAILS are given below of overseas inquiries for United Kingdom products, contracts open for tender, reports on commercial conditions abroad, export trade openings, etc., issued recently by the Export Services Branch, Board of Trade, to subscribers to the *Export Service Bulletin*.

The *Bulletin*, published three times a week, with a weekly Supplement, is available to United Kingdom manufacturers and exporters at a subscription of £10 10s. a year. A subscription form can be obtained from the Export Services Branch, Board of Trade, Room E.09, Hillgate House, 35 Old Bailey, London, E.C.4. (City 5757, Ext. 420), (Telex 25977). Copies of particular *Bulletins* containing further details of the items referred to below can be obtained from the same address on prepayment of the sum of 2s. per copy.

Calls for Tender

*Inquiries connected with the calls for tender mentioned below should be addressed to the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. Reference numbers should always be quoted. The date given is the closing date for tendering. It refers to the current year unless otherwise indicated. Tender documents are available for loan in those cases marked with an asterisk *.*

General (Inquiries by telephone: City 5757, Ext. 406 and 404).

AUSTRALIA

Street Name Plates for The Corporation of the City of Adelaide. September 28. E.S.B. 27987/62.*

Tensiometers for Postmaster General's Department. (Further Information). E.S.B. 25675/62.

Brisbane City Council:

Transformers. October 5. E.S.B. 28307/62.*
Transformers. October 26. E.S.B. 28305/62.*

Commonwealth Stores Supply and Tender Board:

Photo-Engraving Equipment. October 2. E.S.B. 27931/62.*
Photolithography Equipment. September 25. E.S.B. 27933/62.*
Paper. October 16. E.S.B. 27999/62.*
Binding Equipment. October 9. E.S.B. 27998/62.*
Teletype Setting Equipment. October 4. E.S.B. 27995/62.*

BRAZIL

Thermal Electric Power Plant for The Superintendencia do Desenvolvimento do Nordeste. October 9. E.S.B. 27928/62.

BURMA

Communication Equipment for Police Supply Department. October 11. E.S.B. 27990/62/A.I.D.*
Clothing for Defence Dept. October 22. E.S.B. 27916/62*

Union of Burma Purchase Board:

Metal Sheet. September 27. E.S.B. 27992/62.*
Oil Cans. September 24. E.S.B. 28364/62.*
Steel Rolling Grills. September 24. E.S.B. 28365/62.*
Hand Drills. September 24. E.S.B. 28366/62.*
Non-Ferrous Metals. September 25. E.S.B. 28359/62.*
Steel Angles, Sheets and Joists. September 25. E.S.B. 28360/62.*
Hack-Saw Blades. September 25. E.S.B. 28361/62.*
Hand Tools. September 25. E.S.B. 28362/62.*
Belting. September 24. E.S.B. 28363/62.*
Meter (Water Velocity). September 24. E.S.B. 27988/62.*
Pig Iron. September 27. E.S.B. 27991/62.*
Stainless Steel Rounds and Bars. September 27. E.S.B. 27993/62.*
Rail Bender. September 27. E.S.B. 27994/62.*

CHILE

Thermal Power Station for Cia Carbonifera e Industrial de Lota. Closing date not known. E.S.B. 28400/62.
Transformers for Rapel Hydro-Electric Station. (Advance Information). E.S.B. 28399/62.

COLOMBIA

Fire Engines for La Empresa "Puertos De Colombia", October 2. Tender documents in Spanish available. E.S.B. 28374/62.*

EGYPT

Trolley Buses for Cairo City Public Transport Organisation. Closing date postponed to September 30. E.S.B. 22988/62.*
Floating Hotels for United Arab Republic Tourist Administration. Closing date not known. E.S.B. 27721/62.
Gas Singeing Machines for Misr Beida Dyers. September 24. E.S.B. 27921/62.*

Egyptian Railways:

Carbon Brushes. October 1. E.S.B. 27705/62.
Rope (Wire). October 8. E.S.B. 27706/62.

The General Organisation for Executing the Five Year Plan:

Can Manufacturing Plant. December 25. E.S.B. 27942/62.*
Air Conditioning Equipment. October 22. E.S.B. 27943/62.*

Ein Sham University:

Chemicals; Laboratory Equipment (Chemistry). October 6. E.S.B. 28370/62.*
Laboratory Equipment (Wireless). October 8. E.S.B. 28371/62.*
Physics Laboratory Apparatus. October 11. E.S.B. 28372/62.*
Laboratory Equipment (Hydraulic Research). October 4. E.S.B. 28369/62.*
Laboratory Equipment (Concrete Research). October 2. E.S.B. 28368/62.*

EL SALVADOR

Dental Materials for La Proveeduria General de la Republica. September 25. (Further Information). E.S.B. 18686/62.*

ETHIOPIA

Construction of Hospital for Memorial Hospital Fund. October 30. E.S.B. 27997/62.

FORMOSA

Central Trust of China:

Triton. September 27. E.S.B. 27711/62.*
Pipe Fittings. September 24. E.S.B. 27713/62.*
Stator Coils. September 27. E.S.B. 27915/62.*
Threaded Bars; Steel Nuts. September 25. E.S.B. 28377/62.*
Ammonium Sulphate Plant. October 16. E.S.B. 28378/62.*
Refractory Bricks and Mortar. September 26. E.S.B. 28523/62.*
Microfilm Camera. September 27. E.S.B. 28522/62.*
Gas Cylinders. September 29. E.S.B. 28525/62.*
Stator Coils Rewinders. October 3. E.S.B. 27957/62.*
Machine Tools. September 25. E.S.B. 28380/62.*

GERMANY

Cloth for Uniforms for Federal German Postal Authorities Central Purchasing Office. (Advance Information). Closing date not known. E.S.B. 27929/62.

NATO INFRASTRUCTURE CONTRACTS

German Authorities:

Road Construction, Water Supply, Drainage and Building Construction. Apply by September 18. GD 93/62/2 (219).
Road Construction, Water Supply, Drainage and Building Construction. Apply by September 18. GD 93/62/2 (218).
Road Construction, Water Supply, Drainage and Building Construction. Apply by September 18. G.D. 93/62/2 (217).

GREECE

X-Ray Film; Dental Film for Institute of Social Insurance. October 9. E.S.B. 27920/62.*
Cables and Boxes for Public Power Corporation. October 2. E.S.B. 27709/62.

(*Continued on next page*)

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Information for U.K. Exporters (*Continued*)

Ministry of Trade:
Machine Tools and Workshop Equipment. October 1. E.S.B. 27938/62.*
Penicillin. (Further Information). Closing date now October 3. E.S.B. 16525/62.

INDIA

Water Treatment Plant for Stores Purchase Committee. September 24. E.S.B. 28395/62.*
Bridge Construction for Madras Port Trust. December 14. E.S.B. 28392/62.*
Pumps for The Fertilizer Corporation of India Limited. September 28. E.S.B. 28396/62.
Steel for Industries and Commerce Department. September 28. E.S.B. 28391/62.*
Fire Protection Equipment for Assam Electricity Board. (Further Information). E.S.B. 25216/62.*
Slinger Rollover Circuit for Chittaranjan Locomotive Works. (Further Information). E.S.B. 27500/62.*
Electrical Equipment for Government of Mysore Stores Purchase Committee. October 3. E.S.B. 28303/62.*
Cable for Kerala State Electricity Board. September 24. E.S.B. 27901/62.*
Motorised Scrapers for Department of Supplies and Disposals. September 25. E.S.B. 27944/62.*
Railway Wheels and Axles for Integral Coach Factory. October 16. E.S.B. 28336/62.*
Electrical Equipment for the U.P. State Electricity Board. Tender documents now available. E.S.B. 26218/62.*
Cranes for Heavy Engineering Corporation Ltd. Closing date Postponed to September 28. E.S.B. 26211/62.*
Mining Equipment for Neyveli Lignite Corporation Ltd., November 30. E.S.B. 23929/62.*
Laboratory Apparatus: Workshop Machinery and Equipment for Department of Technical Education. October 3. E.S.B. 27953/62.*

Madras State Electricity Board:
Power Line Equipment. Closing date now October 30. E.S.B. 22076/62.
Cable. October 11. E.S.B. 28393/62.*

Damodar Valley Corporation:
Cranes and Hoists. October 22. E.S.B. 28390/62.*
Switchgear. October 15. E.S.B. 28520/62.*

Hindustan Steel Ltd.:
Constructional Project; Cranes; Oil Storage Tank. (Further Information). Tender documents now available for loan. E.S.B. 27492/62.*
Alloy Steel Plant. (Further Information). Closing date now November 15. E.S.B. 20585/62.

Punjab State Electricity Board:
Electrical Equipment. Tender documents now available for loan. E.S.B. 25273/62.*
Electrical Equipment. October 29. E.S.B. 28505/62.

Gujarat Electricity Board:
Civil Engineering. September 24. E.S.B. 28501/62.
Switchgear. November 1. E.S.B. 28512/62.
Communication Equipment. October 22. E.S.B. 28311/62.

Atomic Energy Establishment, Trombay:
Overhead Travelling Crane. (Further Information). Closing date postponed to September 24. E.S.B. 22936/62.
Cutting Equipment (Flame). October 4. E.S.B. 28321/62.
Oscilloscope Camera. October 19. E.S.B. 28323/62.
Densiformeter. October 22. E.S.B. 28324/62.
Switchboards. October 5. E.S.B. 28322/62.
Weight Testing Instrument. September 28. E.S.B. 28320/62.
Thickness Gauge. October 11. E.S.B. 28319/62.
Recorder (Direct Writing). October 10. E.S.B. 28318/62.
Electric Vibrators and Feeders. October 9. E.S.B. 28317/62.

IRAN

Diesel Pumping Sets for Sherkat Sahami Nain. October 2. E.S.B. 28334/62.*

IRAQ

Lathes for Iraqi Republican Railways. September 30. E.S.B. 28515/62.*
Dam Gates for Messrs. Polensky and Zoellner. November 3. E.S.B. 28509/62.
Construction of Swimming Pool for Ministry of Social Affairs. November 5. E.S.B. 28504/62.

Iraqi Ports Administration:
Diesel Alternator Sets. October 24. E.S.B. 27764/62.
Wool Bunting. October 17. E.S.B. 28503/62.

Central Foreign Purchasing Board:
Porcelain Insulators. (Further Information). Tender documents now available. E.S.B. 27267/62.*
Sterilizers. (Further Information). Tender documents now available. E.S.B. 27266/62.*

Baghdad Water Supply Administration:
Jute Gaskin. September 30. E.S.B. 28507/62.
Ferrules. September 30. E.S.B. 28508/62.

Government Oil Refineries Administration:
Chemical Products. (Further Information). Tender documents now available. E.S.B. 27263/62.*
Overall Suits. (Further Information). Tender documents now available for loan. E.S.B. 27262/62.*
Valves; Pipes and Fittings. (Further Information). E.S.B. 27261/62.*
Furfural. (Further Information). E.S.B. 27260/62.*

Ministry of Municipalities:
100 KW Electrical Sets. (Further Information). E.S.B. 27271/62.*
100 KW Electrical Sets. October 27. E.S.B. 28502/62.
Erection of Overhead Electrical Line. October 6. E.S.B. 28512/62.
Removal and Transfer of Electrical Equipment. October 6. E.S.B. 28513/62.
Removal and Erection of 250 KW Electrical Set. (Further Information). E.S.B. 27269/62.*
Water Fittings. Closing date postponed to September 30. E.S.B. 27272/62.*
Meter Testing Equipment. October 20. E.S.B. 27773/62.

Ministry of Defence:
Signals Equipment. October 3. E.S.B. 27786/62.
Medical Instruments. October 1. E.S.B. 27472/62.
Medical Supplies. October 1. E.S.B. 27780/62.*
Water Meters. October 8. E.S.B. 27783/62.
Oil Heaters. October 15. E.S.B. 27787/62.*

IRISH REPUBLIC

Pump for Meath County Council. Closing date not known. E.S.B. 28358/62.
Sewage Plant for Galway County Council. October 15. E.S.B. 28381/62.
Crane for Galway Harbour Commissioners. September 24. E.S.B. 28347/62.

ITALY

Stationery for Allied Land Forces, Southern Europe. October 31. E.S.B. 27034/62.*

KENYA

Builders' Hardware for the Ministry of Works and Communications. Tender documents now available. E.S.B. 26543/62.*
Coffins for City Council of Nairobi. September 24. E.S.B. 27722/62.*

KUWAIT

Chemicals for Ministry of Electricity and Water. Closing date September 26. E.S.B. 28302/62.*
Tools; Water Pumps; Welding Machines for Ministry of Defence. October 6. E.S.B. 28343/62.

NETHERLANDS

Construction of Jetty for Director of Waterways. October 5. E.S.B. 28344/62.

NORWAY

NATO INFRASTRUCTURE CONTRACT.
Pumping Units and Standby Generators for Norwegian Authorities. October 1. GD 5761/58 (54).

PAKISTAN

Tractors; Compactors; Road Rollers; Pumps and Chlorinators for Capital Development Authority. September 25. E.S.B. 27951/62.
Asphalt Cement for Department of Commerce and Industries. September 27. E.S.B. 28333/62.*
Tannin Extract (Cutch) for Pakistan Western Railway. September 24. E.S.B. 28342/62.*

Investment Promotion and Supplies Department:
Gas Proof Covers. October 16. E.S.B. 27908/62.
Air Conditioning Equipment. September 24. E.S.B. 27909/62.

Pakistan Eastern Railway:
Steel Angles; Plates and Flats. September 26. E.S.B. 27947/62.
Leather Items. September 25. E.S.B. 27945/62.
Tool Steel. September 25. E.S.B. 27946/62.
Diesel Engine and Motor Generator Sets. October 10. E.S.B. 27948/62.
Turbo Alternator Set. November 10. E.S.B. 27949/62.

Pakistan Telegraph and Telephone Dept.:
Air Conditioning Equipment. Closing date postponed to October 10. E.S.B. 26818/62.*
Air Conditioning Equipment. Closing date postponed to October 3. E.S.B. 26272/62.*
Air Conditioning Equipment. Closing date postponed to October 10. E.S.B. 26817/62.*
Air Conditioning Equipment. (Further Information). Closing date postponed to October 2. E.S.B. 26158/62.*
Air Conditioning Equipment. Closing date postponed to October 3. E.S.B. 26271/62.*
Air Conditioning Equipment. Closing date postponed to October 2. E.S.B. 26159/62.*
Telephones. October 6. E.S.B. 28326/62.

Directorate of Supply:
Glue Working Machinery. October 4. E.S.B. 28385/62.*
Boiler (Water Tube). October 3. E.S.B. 28388/62.*
Band Saw Machine. October 10. E.S.B. 28384/62.*
Paper. September 25. E.S.B. 28389/62.*
Precision Enlarger and Cinema Carbon. September 24. E.S.B. 27983/62.
Log Cutting Table. October 1. E.S.B. 28329/62.*
Miscellaneous Machinery; Anvils. October 2. E.S.B. 28330/62.*
Tools. October 4. E.S.B. 28331/62.*
Water Distilling Apparatus. October 16. E.S.B. 28387/62.*
Stationery. September 24. E.S.B. 28383/62.*
Miscellaneous Machinery. October 10. E.S.B. 28386/62.*

PHILIPPINES

Hydraulic and Generating Equipment for National Power Corporation. October 30. E.S.B. 27907/62.*

PORTUGAL

Crane for Direccao dos Servicos Maritimos. October 9. E.S.B. 28346/62.
Fire Fighting Equipment for Fire Service National Council. October 1. E.S.B. 27911/62.

RHODESIA AND NYASALAND

Surgical Dressings for Ministry of Health. September 28. E.S.B. 28308/62.

SINGAPORE

Telecommunication Equipment; Television Studio Equipment for Singapore Polytechnic. September 24. E.S.B. 27903/62.*

SOUTH AFRICA

South African Railways:
Copper Wire. October 12. E.S.B. 27972/62.*
Excavators. October 5. E.S.B. 27973/62.*
Plasticware. October 5. E.S.B. 27971/62.*
Trainlighting Batteries. October 5. E.S.B. 27970/62.*
Tie Tampers. October 5. E.S.B. 27968/62.*
Lightning Arrestors and Single Pole Fuse Cut-outs. October 5. E.S.B. 27969/62.*

State Tender Board:
Pumps. October 3. E.S.B. 27977/62.*
Cine Cameras. October 1. E.S.B. 28309/62.*
Abrasive Cloth. October 3. E.S.B. 27958/62.*
Meters. October 3. E.S.B. 27976/62.*

Transvaal Provincial Tender Board:
Drugs. September 28. E.S.B. 27797/62.
Rubber and Latex Ware. September 28. E.S.B. 27795/62.*
Laboratory and Dispensary Sundries. September 28. E.S.B. 27794/62.*
Laboratory Glassware. September 28. E.S.B. 27796/62.*

(*Continued on page* 580)

A MARKET IS MORE THAN PEOPLE!

"Markets are People". We have heard this phrase so often that we have stopped thinking about it. True, of course, in the sense that we must consider a market as consisting of living persons and not just as a slab of colour on the map, but we cannot measure the value of a market by the number of its inhabitants. We must measure it by their need for goods from outside plus their ability to pay for them.

Except for little Iceland (population 175,000), Norway holds the record for imports per head of population in Europe – £133 per head in 1959 as compared with Britain's figure of £73. Even in absolute terms Norway is a sizeable market. Its 3.6 million people imported from Britain in 1960 goods worth £71 million, f.o.b. – more than Belgium's 9 million people and far more than Pakistan or Japan with populations of over 90 million.

What kind of goods? The remarkable increase in living standards in 1950-60 was most strikingly reflected in the sale of durable goods. During this decade Norway's 1,050,000 households bought about half a million washing machines and almost as many refrigerators, the expenditure on all electrical household appliances went up 700 per cent., cars and petrol, home furnishings, toilet goods and pharmaceuticals, foreign travel, are all absorbing a big share of the higher incomes which are being earned all over the country. These are the kinds of goods and services which Britain can offer. But it is not enough to offer them, they have to be sold. This means that they have to be advertised in the most effective medium – the big newspapers which are read by people with the highest buying power.

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JOSHUA B. POWERS Ltd.

27, COCKSPUR STREET, LONDON, S.W.1. – TEL.: WHItehall 6322

Information for U.K. Exporters (*Continued*)

Lathes. September 28. E.S.B. 28352/62.*
Vehicles. September 28. E.S.B. 28353/62.*

SOUTH VIETNAM

Central Purchasing Authority:
Laboratory Equipment. September 26. Tender documents in French available. E.S.B. 27754/62.*
X-Ray Equipment. September 26. Tender documents in French available. E.S.B. 27751/62.*
Surgical Instruments. September 26. Tender documents in French available. E.S.B. 27752/62.*
Hospital Apparatus. September 26. Tender documents in French available. E.S.B. 27753/62.*
Laboratory Equipment. September 26. Tender documents in French available. E.S.B. 27755/62.*

SUDAN

Piping (Galvanized) for The Sudan Gezira Board. October 10. E.S.B. 27975/62.*
Pumps for Ministry of Works. October 15. E.S.B. 28350/62.
Department of Posts and Telegraphs:
Cable. October 4. E.S.B. 28349/62.*
Cable. October 3. E.S.B. 28548/62.*
Khartoum Municipal Council:
Tractors. September 27. E.S.B. 28340/62.
Road Making Plant and Machinery. September 29. E.S.B. 28341/62.*

THAILAND

Phosphor Bronze Machine Wire Cloth for the Thai Paper Factory. September 25. E.S.B. 27986/62.
State Railway of Thailand (Yod-Se):
G.I. Pipes and Fittings. September 27. E.S.B. 27964/62.
Shaping Machine. October 9. E.S.B. 27984/62.*
Drilling Machine. October 10. E.S.B. 27985/62.*

TRINIDAD

X-Ray Apparatus for Central Tenders Board. October 12. E.S.B. 27392/62.*
Trinidad and Tobago Electricity Commission:
Cathodic Protection Equipment. November 30. E.S.B. 27937/62.*
Fuse Connectors. October 25. E.S.B. 27936/62.*

TURKEY

Laboratory Equipment for Devlet Su Isleri Genel Mudurlugu. October 1. E.S.B. 27800/62.*

UNITED STATES OF AMERICA

Dam Hoists and Gates for Bureau of Reclamation, Denver. September 27. E.S.B. 28555/62.*

URUGUAY

Super Gas Plant for Administration Nacional de Combustibles Alcohol y Portland. E.S.B. 27904/62.*

Agency and Export Opportunities, Market Surveys, Etc.

Further details of the items referred to below are contained in recent issues of the Export Service Bulletin, or Supplement, copies of which can be obtained from the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, on prepayment of the sum of 2s. per copy. The reference number should be quoted in all inquiries.

Abu Dhabi
Economic report, April-June 1962. (C.R.E. 5867/G.)

Argentina
Economic report, April/June 1962. (C.R.E. 4850/61.)

Australia
Agency inquiry for machine tools; electric and electronic apparatus; laboratory and scientific equipment. (E.S.B. 27623/62.)
Inquiry for resin; wire; turnbuckles; sliding doors; blinds; curtain rods. (E.S.B. 25594/62.)
Reference to the Special Advisory Authority. (C.R.E. 9981/62.)

Austria
Agency inquiry for materials for metal working industry; machinery; chemicals. (E.S.B. 17175/62.)
Inquiry for wire conductor. (E.S.B. 28005/62.)

Brazil
Market report on food processing machinery. (E.S.B. 24165/62.)

Canada
Inquiry for twine; wire. (E.S.B. 28044/62.)
Manufacture under licence – electrical equipment. (E.S.B. 28050/62.)

Chile
Inquiry for steel; mining equipment and supplies; hose; diesel marine engines; marine equipment; pumps; fishmeal and oil plant. (E.S.B. 28242/62.)
Market report on water pumps. (E.S.B. 23256/62.)

Cuba
Economic report, April-June 1962. (C.R.E. 3569/62.)

Denmark
Economic report – July 1962. (C.R.E. 3029/61.)

Ethiopia
Economic report, January-June 1962. (C.R.E. 1898/62.)

France
Agency inquiry for food machinery. (E.S.B. 27808/62.)
Agency inquiry for period furniture. (E.S.B. 27322/62.)
Agency inquiry for clothing. (E.S.B. 28174/62.)
Agency inquiry for headscarves; handkerchiefs; silk fabrics. (E.S.B. 28010/62.)
Agency inquiry for mechanical handling plant. (E.S.B. 23595/62.)

Germany (Federal Republic)
Economic report – August 27-September 7, 1962. (C.R.E. 1479/G.)
Import Committee Publication – August 24, 1962–breakfast foods etc. (C.R.E. 158/62.)

Hungary
Inquiry for housewares; hardware; tools. (E.S.B. 27622/62.)

Iraq
Agency inquiry for tile cement. (E.S.B. 27826/62.)

Israel
Agency inquiry for permanent magnets. (E.S.B. 28039/62.)

Jordan
Inquiry for chemical boiler compound. (E.S.B. 27694/62.)
Patents agent. (E.S.B. 25096/62.)

Kenya
Agency inquiry for dish washers; cosmetics; foodstuffs; jewellery; wheelbarrows. (E.S.B. 24066/62.)
Inquiry for suitings; cotton prints. (E.S.B. 27628/62.)

Kuwait
Inquiry in respect of civil engineering; building materials. (E.S.B. 27829/62.)

Lebanon
Inquiry for prison equipment; electrical equipment; telecommunications; heating equipment; kitchen equipment; sanitary and washing installations. (E.S.B. 28177/62.)

Malagasy Republic
Economic report – January-June 1962. (C.R.E. 6435/59.)

Malaya
Inquiry for hydrated lime. (E.S.B. 28134/62.)

Mexico
Inquiry in respect of expansion of fishing industry. (E.S.B. 19896/62.)

Netherlands
Agency inquiry for curtaining. (E.S.B. 28067/62.)

Norway
Market report on dressed leathers. (E.S.B. 21569/62.)

Pakistan
Agency inquiry for chemicals; hospital equipment; iron and steel; electrical equipment; machinery and plant; railway equipment; tyres and tubes. (E.S.B. 27574/62.)
Agency inquiry for electrical equipment; diesel engines; earthmoving machinery. (E.S.B. 28047/62.

Persian Gulf (Trucial States)
Market report on tinned, bottled and packeted foodstuffs. (E.S.B. 18975/62.)

Poland
Inquiry for wires; wire ropes; wirecloth; hoses; welding electrodes; springs; chains. (E.S.B. 28204/62.)

Portuguese East Africa
Market report on cosmetics; toilet preparations and perfumery. (E.S.B. 24430/62.)

Qatar
Market report on tinned, bottled, packeted and frozen foodstuffs. (E.S.B. 24085/62.)

Spain
Inquiry for machinery for fertilizer factory; electrical equipment; tubing. (E.S.B. 27529/62.)
Economic report, July 1962. (C.R.E. 2223/62.)

Sudan
Economic report, January-June 1962. (C.R.E. 1897/62.)

Sweden
Agency inquiry for canning machinery; machine tools; packaging machinery; tinplate. (E.S.B. 28056/62.)
Inquiry for gas containers; chemicals for fire extinguishers. (E.S.B. 27817/62.)

Switzerland
Agency inquiry for curling stones. (E.S.B. 27566/62.)
Agency inquiry for machinery; materials for paper mill. (E.S.B. 28116/62.)

Thailand
Agency inquiry for earth moving equipment and machinery. (E.S.B. 28184/62.)

Trinidad
Market report on domestic electric refrigerators; deep freezers; cookers. (E.S.B. 25763/62.)

Turkey
NATO Infrastructure. (G.D. 5693/58.)

(*Continued on next page*)

THIS BOOKLET entitled "New Business in Australia" has been specially compiled to assist companies considering the extension of their activities to Australia. Its contents include information on such questions as Company Law, Taxation, Import and Export Controls, Patents, Trade Marks, Finance etc. Copies of the booklet are available at any of our Offices. Please call, write or telephone. We are equipped to furnish any further information and details desired.

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Information for U.K. Exporters (*Continued*)

United States of America

Agency inquiry for electrical transmission equipment. (E.S.B. 25138/62.)
Inquiry for cake decorations; baking supplies; wall nails. (E.S.B. 26931/62.)
Inquiry for chocolates. (E.S.B. 28173/62.)
Inquiry for hardware and housewares; garden tools; sports goods; giftware; automotive items; toys. (E.S.B. 25719/62.)
Inquiry for confectionery. (E.S.B. 27674/62.)
Inquiry for vegetable fat. (E.S.B. 28049/62.)
Inquiry for chemicals; pharmaceuticals. (E.S.B. 28117/62.)
Inquiry for leather; shoe materials. (E.S.B. 28146/62.)
Inquiry for milling machines; engine lathes. (E.S.B. 27863/62.)

Various Countries

European Economic Community – rules of competition.

Venezuela

Agency inquiry for radios and radiograms. (E.S.B. 27666/62.)

We are cash buyers of merchandise of every description. Also Clearance Stocks, Discontinued Lines, Surplus and Redundant Stocks. also BOTTLES, Jars, Screw Caps, Cartons, and other Packaging Materials. In fact, goods of all kinds can be disposed of through us without delay, on the most favourable terms, and without trouble.

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MANCHESTER ..... 326 Chester Road, Manchester, 16. Tel: Trafford Park 2241.

Tariff, Customs, Import and Other Regulations in Overseas Countries

Registered Trade Mark (rtm) Goods in Overseas Tariff Lists

THE LISTS OF TARIFF, Customs and import regulation changes in overseas countries published in this section of the Journal sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view.

Items which fall into this category will now be prefixed by the letters 'r t m'. Readers of the Journal should note that this prefix signifies that the words are registered as trade marks in the United Kingdom, but that in the present context they are assumed to refer generally to products of the description stated in brackets.

While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

ITALY

Customs Modifications and Changes in Duty-Free and Duty Reduced Quotas

IN PRESIDENTIAL Decree No. 972 of July 16, 1962, the Italian Government extends until December 31, 1962, with certain modifications, the previous arrangements concerning quotas for iron and steel goods (see *Board of Trade Journal* of March 16, 1962, page 587).

A translation of the relevant articles of the Decree is given below:

Article 1

From July 1, 1962, and up to but not beyond December 31, 1962, the following become applicable to the undermentioned products imported into Italy from non-member countries of the European Coal and Steel Community:

(a) Customs duty at the rate of 1 per cent. *ad valorem* for pig iron and cast iron in pigs, blocks, lumps and similar forms, containing by weight from 0·3 per cent. to 1 per cent. inclusive of titanium and from 0·5 per cent. to 1 per cent. inclusive of vanadium (tariff heading Ex 73.01);

(b) Customs duty at the rate of 4 per cent. *ad valorem*, subject to observance of the rules and conditions to be laid down by the Minister for Finance, for iron or steel coils for re-rolling, not clad, of a width of under 1·5 metres (sub-heading No. 73.08 a 1 in the Tariff), within the limits of a quota of 30,000 tons reserved for firms not equipped with steelmaking plant but equipped with plant for cold-rolling coils for the production of cold-rolls, sheets, wholly or partly intended for the manufacture, with the firm's own plant, of tinned strip or zinc-coated or lead-coated sheets;

(c) Suspension of Customs duty, within the limits of a quota of 1,500 tons and subject to observance of the rules and conditions to be laid down by the Minister for Finance, for sheets and plates known as 'electric' with a loss in watts per kg. not exceeding 0·75 watt, whatever their thickness – sheets and plates with uniform crystal arrangement (sub-headings Nos. 73.13 a 1 and 73.15 b 6 alpha 1 in the Tariff);

(d) Suspension of customs duty, within the limits of a quota of 1,200 tons subject to observance of the rules and conditions to be laid down by the Minister of Finance, for high-carbon steel rods, simply hot-rolled and coated, of a diameter between 4·5 and 5·5 millimetres, and containing between 0·62 per cent. and 0·74 per cent. carbon, intended for use in the pneumatic tyre industry. (Tariff number ex 73.15-A IV-b.)

Article 3

As from August 1, 1962, and until December 31, 1962, Customs duty is suspended on the following products, imported from all sources:

(a) 3 B-hydrocyandrost-5-en-17-one (Tariff No. ex 29.13 -D -I-b).

(b) Manilla hemp (abaca) and 'Musa textilis', raw, combed, or as tow and waste (Tariff No. 5702).

In Presidential Decree No. 973 also of July 16, certain further modifications (additional to those published in the *Board of Trade Journal* on August 3, 1962) have been made to the Customs Tariff to bring Italian duties into line with decisions made by the European Economic Community. Those affecting imports from Britain apply to the following tariff numbers and parts thereof:

28.27	78.04
28.30	78.05
28.41	79.02
28.55	79.03
59.17	85.23
78.02	93.07
78.03	

Changes in the Customs duty on raw tobacco (Tariff No. 24.01)

Presidential Decrees Nos. 976 and 1118 announce the following changes in duties on imports of raw tobacco from third countries, as from August 1, 1962:

	Rate of duty
Tariff No. 24.01. *Unmanufactured tobacco, tobacco refuse*:	
A. Tobacco of a value of 280 accounting units* or over, per 100 kg. net weight.	4·50% *ad val.* with a maximum rate of 21 accounting units* per 100 kg. net weight.
B. Others:	
I. Tobacco	8·4% *ad val.* with a minimum rate of 8·70 accounting units* and a maximum rate of 11·4 accounting units* per 100 kg. net weight.
II. Refuse	

* Accounting unit = 1 dollar.

Customs Modifications following GATT Tariff Conference

PRESIDENTIAL DECREE No. 1118, which took effect on August 1, 1962, modified the Italian Tariff to conform with reductions in the Common Tariff which were conceded by the E.E.C. at the 1960/61 GATT Tariff Conference (see *Board of Trade Journal* of May 25, 1962, page 1120).

Italian duties on a range of manufactures and a few foodstuffs and raw materials were therefore amended from August 1, as regards imports from countries not members of the E.E.C.

Temporary Cut in Italian Tariff

PRESIDENTIAL DECREE No. 1274 of August 26, 1962, announces that in order to contain the recent increase in wholesale prices, it has been found desirable to increase foreign imports and reduce customs duties.

The following modifications to the Customs Tariff are therefore effective from August 29, 1962, and are calculated by reference to the duties in force immediately before that date:

(a) a temporary reduction of 10 per cent. on the duties applicable to goods from other member countries of the E.E.C.

(b) a temporary reduction of 10 per cent. on the duties applicable to goods from countries outside the E.E.C., provided that this does not mean going below the duties of the joint E.E.C. customs tariff. Duties will be rounded down to one place of decimals.

The reduction is a temporary one so that it may be reabsorbed when reductions in the Italian Customs Tariff are effected in due course under the Treaty of Rome.

In consequence of Italy's international commitments and bearing in mind certain special situations prevailing in Italian industry, the

Italy (*Continued*)

reduction in question will not apply:

(a) to duties levied on products which are the object of the Common Market of the European Coal and Steel Community and of the European Atomic Energy Community;

(b) to taxes on agricultural products coming under the provisions of the special regime of the Community, as mentioned in Article 1 of Decree Law No. 955 of July 30, 1962; this applies to cereals, pigmeat, eggs and poultry;

(c) to duties levied on a number of products of special interest to Italian industry, including duties on so-called 'isolated' products, which were not reduced in the past or brought into line with the E.E.C. tariff when the relative decisions of the Community were enforced, Italy having applied for exemption from the Treaty commitments. These items mainly apply to manufactures of lead and zinc, and of silk under the Tariff headings given below, and they will continue to pay the previous rates of duty for whatever period the duty may remain in force:

ex 2815	ex 2855	5009	ex 7901
ex 2819	ex 3207	ex 5917	7902
2827	5001 *	ex 7801	7903
ex 2830	5002	7802	ex 8504
ex 2835	5004	7803	ex 8523
ex 2841	ex 5007	7804	ex 9307
ex 2847	5008	7805	

The Italian text of these Decrees can be seen in Export Services Branch (Tariff Section), Board of Trade, Room E.45, Hillgate House, 35 Old Bailey, London, E.C.4. (Telephone: City 5757, extensions 456, 457.)

Import Licensing for Pig Meat, Offals and Some Cereals

BY MINISTERIAL DECREES dated July 25, the Italian Government have included in Import List 'B' (which includes the United Kingdom) the following items which now become subject to import licensing until December 2, 1962:

ex 02.01 A III a	Pig meat, fresh, frozen or chilled.
ex 02.01 B II	Pig offals, fresh, chilled or frozen.
ex 02.06 B	Edible pigmeat and offals salted or in brine, dried or smoked.
11.02 A I a	Cereal groats and meal of wheat.

Setting Up a Business in Italy

ATTENTION may be drawn to the following booklets, containing useful information on this subject, published in English by certain Italian banks, and available from them free of charge on request:

Useful Information for Investing Capital in Italy. From Credito Italiano, 158 Fenchurch Street, London, E.C.3. (Tel.: Mincing Lane 8851.)

Vade Mecum for Foreign Investors in Italy. From Banca Commerciale Italiana, 21 Birchin Lane, London, E.C.3. (Tel.: Mansion House 0148.)

Outlook for the Development of Sicily. From Banco di Sicilia, 20 Cannon Street, London, E.C.4. (Tel.: City 2173.)

TURKEY

Global Import Quotas and Liberalization Lists

THE FOLLOWING amendment should be made to the Liberalization List published in the *Board of Trade Journal* of August 3 (pages 287 to 290):

Liberalization List

Tariff No.	Description of Goods	
84.15.30	Only refrigerating apparatus and equipment for lorries for the transport of meat, fish, and fresh fruit and vegetables	With the permission of the Ministry of Commerce.

Teleurope

Details of what European export and import trade offers together with information about the many enterprises of 19 European countries is contained in 'Teleurope'. Inquiries should be directed to Teleurope, P.O. Box 320, Darmstadt, Germany.

SPAIN

Additions to Seventh Liberalization List

SPAIN's Seventh Liberalization List was published in the *Board of Trade Journal* of July 26, 1962 (pages 153-157).

The Spanish authorities have now published the following additions to the List:

Tariff No.	Article	Effective date
Ex 03.01	Fish*, fresh (live or dead), chilled or frozen . . .	August 27
03.02 B	Fish roes	"
03.02 C	Other	"
16.04	Prepared or preserved fish, including caviar and caviar substitutes	"
Ex 20.05	Jams, fruit jellies, marmalades, fruit puree and fruit pastes, not containing added sugar	"
Ex 20.06	Fruit otherwise prepared or preserved not containing added sugar	"
20.07 A	Fruit juices (including grape must) or others, unfermented, not containing spirit, and not containing added sugar	"
25.23	Hydraulic cements (including clinker) including coloured	"
29.23 D 1	Glutamic acid and its salts	"
31.03 D	Superphosphates	"
82.11 B	Strips and metallic parts for electric razors . . .	January 1, 1963

*The Spanish authorities have listed the classes of fish liberalized under their Latin names. This information can be supplied on written request to Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1, quoting reference No. C.R.E. 3666/2/G.

Ecuador has now been added to the list of countries to which the Spanish system of Liberalization applies.

EUROPEAN ECONOMIC COMMUNITY

English Translation of the E.E.C. Regulations

THE FOLLOWING further translation of the E.E.C. Regulations (see *Board of Trade Journal* of September 7, August 10, and August 24 for notification of previous translations) is now available from H.M. Stationery Office, Kingsway, London, W.C.2, and branches:

Regulation No. 62. Determining the emoluments of members of the Court of Justice. Price 1s. 0d.

NIGERIA

Revised Import Licensing Regulations

THE MINISTER of Commerce and Industry, Nigeria, has, under Legal Notice 112 of 1962, published in the Federal *Official Gazette* of August 16, 1962, revoked the Open General Licence (Wheat and Wheat Flour) No. 5 of 1959 (see *Board of Trade* Journal of January 1, 1960, page 30). In consequence of this the Second Schedule of Open General Licence No. 2 of 1959 has been amended to include the following additional items for which a specific import licence is required for goods imported from the United Kingdom:

Item		Import List No.	
10	(i) Wheat and Spelt (including meslin), unmilled . .	041	010
	(ii) Meal and Flour of wheat and spelt (including meslin)	146	010

Customs Tariff Amendment

LEGAL NOTICE 108 of 1962, published as Supplement to the Federation of Nigeria *Official Gazette* of August 15, 1962, gives details of the Customs Tariff (Duties and Exemptions) (No. 5) Order, 1962, which is effective from August 15, 1962, and which amend the First Schedule (Import Duties) by the following new item:

61A Umbrella Covers .. .. each 1s. 8d. or *Ad Valorem* 33⅓% whichever is the higher.

Explanatory Note:

This Order has the effect of increasing the duty on Umbrella covers from 20 per cent. *ad valorem* to 1s. 8d. each or 33⅓ per cent. *ad valorem* whichever is the higher.

REPUBLIC OF SOUTH AFRICA

Rebate of Duty for Manufacturing Purposes

GOVERNMENT NOTICES Nos. R.1400, R.1401 and R.1424 published in the Republic of South Africa *Government Gazette* of August 31, 1962, amend the Second and Third Schedules of the customs tariff and provide for the rebate of duty to the extent set out below on the following goods when imported or withdrawn from bond by registered manufacturers for use in the industry specified (second schedule) or when imported for commercial and industrial purposes (Third Schedule).

G.N. No.	Tariff Item	Article	Rebate of Duty	Refund of Duty
R. 1424		SECOND SCHEDULE.		
	499	By the substitution, for the item, of the following item:		
	499	INDUSTRY FOR THE MANUFACTURE OF HANDKERCHIEFS: Woven fabric in the piece, containing 50% or more by weight of cotton .	The whole duty less *ad val.* 10%	
		THIRD SCHEDULE		
R. 1400	966	Materials or aticle used in the manufacture processing ror packing of goods in the Republic, as specified hereunder, on exportation of such goods: (a) to territories other than Basutoland and the Protectorates of Bechuanaland and Swaziland: By the addition, after sub-paragraph (66) of paragraph (a) of the following sub-paragraph: (67) Dieldrin, sodium tripolyphosphate and prepared surface active agents, used in the manufacture of insecticides		The whole duty.
R. 1401	966	By the addition after sub-paragraph (67) of paragraph (a) of the following sub-paragraph: (68) Furfelt hoods, used in the manufacture of men's and boys' hats .		The whole duty.

Most-Favoured-Nation Tariff

GOVERNMENT NOTICE No. R.1402, published in the Republic of South Africa *Government Gazette* of August 31, 1961, amends the Fourth Schedule of the Customs Tariff which sets out the countries enjoying most-favoured-nation treatment by adding Portugal and its overseas provinces to the list of countries enjoying such treatment.

Customs Tariff Applications

CUSTOMS TARIFF application List No. 313, published as Government Notice No. 619 in the Republic of South Africa *Government Gazette* of August 31, 1962, states that the Board of Trade and Industries, has received the following applications affecting the Republic's Customs Tariff:

1. For an increase in duty on:
   Sodium bichromate, chrome tanning salts and chromic acid from free of duty, 10 per cent. and 15 per cent. *ad valorem* respectively to 20 per cent. *ad valorem*.
2. For the deletion of the provisions under the following tariff items. (Proposed by the Brussels Nomenclature Committee in order to facilitate transposition of the existing tariff into the international nomenclature).

74 (a) Fruit tree netting and seed bed cloth.
116 (c) (i) Metal parts for the manufacture of acetylene lamps other than miners' hand and bucket lamps; metal castings in the rough, wire, chains, screw eyes, escutcheon pins and burners, for the manufacture of miners' hand and bucket acetylene lamps.
168 (2) Ground cast iron and abrasive grains, for hardening cement and for the construction of anti-slip flooring and pavements.
263 Boxes, wooden, empty or in shooks:
(a) (i) For packing fresh fruit (except citrus), dried fruits, dairy produce, eggs, fresh sausages, and condensed milk manufactured in the Republic.
(ii) For packing citrus fruits; and providing for a refund of duty on the boxes mentioned against (i) and (ii) above on exportation of such products.
318 (c) Sheathing felt for ship and boat-building.
76 (4); 77 (6); 78 (4) (a) and (b); and 80 (3) (d) Various yarns, threads and twists.
NOTE: The Committee suggests that the provision on yarns, threads and twists be based on whether or not yarns, threads and twists are packed and put up for sale by retail. The expression 'put up for sale by retail' is defined as follows:
(A) Yarns put up:
(a) In balls, or on cards, reels, tubes or similar supports, of a weight (including support) not exceeding:
(i) 200 grammes in the case of flax or ramie;
(ii) 85 grammes in the case of silk, noil or other waste silk, and man-made fibres (continuous); or
(iii) 125 grammes in other cases;
(b) In hanks or skeins of a weight not exceeding:
(i) 85 grammes in the case of silk, noil or other waste silk, and man-made fibres (continuous); or
(ii) 125 grammes in other cases;
(c) In hanks or skeins comprising several smaller hanks or skeins separated by dividing threads which render them independent of one another, each of uniform weight not exceeding;
(i) 85 grammes in the case of silk, noil or other waste silk and man-made fibres (continuous); or
(ii) 125 grammes in other cases.
(B) Exceptions:
(a) Single yarn of any textile material other than:
(i) Single yarn of sheep's or lamb's wool or of fine animal hair, unbleached; and
(ii) Single yarn of sheep's or lamb's wool or of fine animal hair, bleached, dyed or printed of a length less than 2,000 metres per kilogramme.
(b) Multiple or cabled yarn, unbleached:
(i) Of silk, noil or other waste silk, however put up; or
(ii) Of other textile material, except sheep's or lamb's wool or fine animal hair, in hanks or in skeins.
(c) Multiple or cabled yarn of silk, noil or other waste silk, bleached dyed or printed, of a length not less than 75,000 metres per kilogramme, measured multiple; and
(d) Single, multiple or cabled yarn of any textile material:
(i) In cross-reeled hanks or skeins; or
(ii) Put up on supports indicating their use in the textile industry (for example, cops, twisting mill tubes, conical bobbins or spindles).

Where British trade organizations are thought to be interested in the above applications they are being informed, and it is suggested that any British firm wishing to make representations to the South African Board of Trade and Industries and belonging to a trade organization, should get into touch with that body in the first instance. Firms proposing to make independent representations to the South African Authorities and desiring further information relating to the above should address their inquiries to the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1, quoting references (1) C.R.E. 10055/62; (2) C.R.E. 10056/62.

Import Control

DETAILS were given in the *Board of Trade Journal* of September 7, 1962 (page 539) of the additional Import Quotas for 1962 announced by the Republic of South Africa Government. Item (c) should be amended to read as follows.

(c) For textile piecegoods: 10 per cent. for merchants.

(d) For smaller importers additional Quotas will be raised to minimum of R.500.

GHANA

Registration of Importers

THE GHANA Ministry of Finance and Trade have announced that the Ministry will now maintain a Register of Importers. Applications for licences to import goods durings 1963 in commercial quantities will not be considered unless they come from individuals and establishments whose names appear on the Register.

Importers who wish to be registered should obtain application forms from The Ministry of Finance & Trade, (Trade Division) Accra; or from any of the Division's Branch Offices in Takoradi, Kumasi Sunyani and Ho; or from the Regional Commissioners' Offices in Tamale and Bolgatanga.

Establishments which have more than one Office should apply through their Head Offices only.

Importers are advised to obtain, complete, and return their forms early, so that the issue to them of licences may not be delayed. Completed application forms should be sent direct to: The Controller of Imports & Exports, Ministry of Finance & Trade, (Trade Division) Accra.

Applications containing incorrect or insufficient information will be returned, and will be deemed not to have been received until they have been correctly resubmitted.

Ghana (*Continued*)

Import Licensing

NOTICE TO IMPORTERS No. 191, published in the Commercial and Industrial supplement to the *Ghana Gazette* of August 31, 1962, amends Open General Licence No. 1 (b) to read:

1 (b) Stationery including Account Books, Bank Cheque Books, Calendars, Desk and Pocket Diaries.

Explanatory Note: Specific import licences for calendars and diaries are no longer required and those previously issued for these items are cancelled.

Exchange Control

THE BANK of Ghana have issued the following directive:

Exchange Control

Manufacturers' invoices covering imports of merchandise into Ghana

In view of the various representations which have been made to this Bank about our request for the supply of manufacturers' invoices in connection with the imports of merchandise into Ghana, our instructions of July 7, 1962, are amended as follows:

Importers should attach to their applications on Form A.1. manufacturers' invoices and suppliers' invoices, or, in the absence of manufactureres' invoices, Chamber of Commerce certificates to the effect that the prices of goods enumerated in the suppliers' invoices are the current market prices.

The effective date of this directive is October 1, 1962.

FEDERATION OF RHODESIA AND NYASALAND

Customs Tariff Changes

FEDERAL GOVERNMENT Notice No. 271, published in the Federation of Rhodesia and Nyasaland *Government Gazette* of August 31, 1962, sets out the following amendment to the Customs Tariff with effect from that date. Britain pays the Column D rate of duty.

Tariff Item	Article	Duty A	Duty B	Duty C	Duty D
81	Threads and yarns, n.e.e. By the repeal of the item and by the substitution therefor of the following item:				
81	Threads and yarns, n.e.e.:				
	(a) Containing 50 per cent. or more of cotton:				
	(i) Containing 100 per cent. of cotton *ad val.*	20%	10%	10%	10%
	(ii) Cotton with rayon . *ad val.*	20%	10%	10%	10%
	(iii) Other . . . *ad val.*	10%	Free	Free	Free
	(b) Containing 50 per cent. or more of rayon:				
	(i) Containing 100 per cent. of rayon *ad val.*	20%	15%	10%	10%
	(ii) Rayon with cotton . *ad val.*	20%	15%	10%	10%
	(iii) Other . . . *ad val.*	10%	5%	Free	Free
	(c) Other, including monofil . *ad val.*	10%	5%	Free	Free

Suspensions of Duty

FEDERAL GOVERNMENT Notice No. 270, published in the Federation of Rhodesia and Nyasaland *Government Gazette* of August 31, 1962 makes provision for the following:

(a) the extension of the suspensions of duty granted on yarns manufactured from cotton, rayon, mixtures of cotton and rayon or mixtures of cotton or rayon and other fibres; and

(b) the suspension of the duties on cotton and rayon yarn, despatched to the Federation on or before August 23, 1962, to the effective rates in force on that day.

Investment in Europe

'Investment in the E.E.C.' deals with the formalities and procedure to be complied with by United Kingdom firms wishing to operate in the E.E.C. It also covers the concessions and inducements offered by the Governments of the Community to attract foreign investment and contains notes on foreign exchange regulations, taxation and labour conditions. Copies from Chamber of Commerce Publications, 68 Queen Street, London, E.C.4. Price 2s. 6d.

Customs Tariff Changes

DETAILS were published in the *Board of Trade Journal* of September 7, 1962 (page 534) of Changes in the Federation of Rhodesia and Nyasaland Customs Tariff. Federal Government Notice No. 271, published in the Federation of Rhodesia and Nyasaland *Government Gazette* of August 31, 1962, further amends the following item with effect from that date. Britain pays the Column D rate of duty:

Tariff Item	Article	Duty A	Duty B	Duty C	Duty D
65	By the repeal of sub-paragraph (i) of paragraph (d) and by the substitution therefor of the following sub-paragraph: (i) SHORTS:				
	(A) Of a waist measurement of 23 inches or more . *ad val.* or per garment	40% £0 7s. 6d. whichever	30% £0 5s. 0d. duty	30% £0 5s. 0d. shall be the	20% £0 3s. 9d. greater
	(B) Other . *ad val.* or per garment	40% £0 6s. 6d. whichever	30% £0 4s. 0d. duty	30% £0 4s. 0d. shall be the	20% £0 2s. 9d. greater

MOZAMBIQUE

Import Restrictions

H.M. CONSULATE-GENERAL at Lourenço Marques reports that the Mozambique Foreign Trade Board announced in the Official Bulletin of the Province on June 30, 1962, the introduction of a new procedure for the registration and licensing of the import trade of the Province. One feature of the new arrangements is a rule that certain listed products are not to be licensed for importation from non-Portuguese sources unless the importer is also acquiring similar products of national origin. The permitted ratios of foreign goods to goods of national origin range from 100 national: 100 foreign for some products to 100 national: 5 foreign; and in some cases there are prescribed ratios of local (Mozambique) goods to foreign goods. The list is entitled 'List of Products whose importation into Mozambique from non-Portuguese sources is restricted', and shows the respective permitted ratios for the many categories of listed products which it contains.

Translations of the list may be obtained from the Export Services Branch (Tariff Section), Board of Trade, Hillgate House, 35 Old Bailey London, E.C.4. (Telephone: City 5757, Extensions 460 or 462.)

SINGAPORE

Pioneer Industries Ordinance

THE BOARD OF TRADE has been informed by cable that the Singapore Government proposes to declare the following industry and products to be a Pioneer Industry and Pioneer Products under the Pioneer Industries (Relief from Income Tax) Ordinance, 1959:

Industry	Products
Garments	(i) Wearing apparel (ii) Nylon knitted goods

This notice means that the Minister of Finance is satisfied that the products mentioned above should be made in Singapore. Firms to which Pioneer Certificates are granted will enjoy the benefit of exemption from Singapore Income Tax for a period of five years. Any person may object to the making of the proposed Order by giving notice in writing to the Minister of Finance on or before September 30. 1962.

The Singapore Government has also declared the following to be Pioneer Industries and Pioneer Products under the above mentioned Ordinance:

Industries	Products
(A) Animal feed preparation	Animal feedmix
(B) Chemicals	Regenerated lubricating oil
(C) Metal manufacture	Prefabricated standard steel-framed buildings.

A preliminary notice of the intention of the Singapore Government to designate these products appeared in the *Board of Trade Journal* of June 8, 1962, page 1316.

(*Continued on next page*)

Singapore (*Continued*)

Further inquiries about the Pioneer Industries legislation may be made to the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone: Trafalgar 8855, Extension 2317). Please quote reference C.R.E. 11038/60.

CEYLON

Import Trade Control

THE BRITISH Trade Commissioner in Colombo has reported by cable that individual licences are not now required for the importation of printing paper and writing paper from the United Kingdom.

FEDERATION OF MALAYA

Customs Tariff Amended

THE BOARD OF TRADE have received a copy of the Customs Duties (Amendment) (No. 3) Order, 1962, which amends the First Schedule to the Customs Duties Order, 1961. Item No. 733 129, Other parts and accessories, not elsewhere specified, of cycles (including trishaws, delivery tricycles and children's cycles in the normal form of adult's cycles) not motorized, has been deleted and the items listed below have been amended to read as follows:

Item No.	Description	Unit of Quantity	Import Duty	
			Full	Preferential
			$ cts.	$ cts.
698 301	Transmission chains for pedal cycles of not over 114 links	No.	·20	Nil
733 110	Cycles (including trishaws, delivery tricycles and children's cycles in the normal form of adults' cycles) not motorized	No.	14·00	11·00
	Parts of articles falling within item 733 110.			
733 122	Parts of frames	No.	1·83	1·73
733 123	Saddles	No.	·88	·68
733 124	Handlebars (with or without brake fittings)	No.	1·33	1·13
733 125	Rims	No.	1·33	1·13
	New items:			
733 126	Seat pillars	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 127	Lamp brackets	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 128	Mudguards	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 129	Chain wheels and cranks	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 130	Front forks	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 131	Bracket lugs	No.	33⅓% *ad val.*	33⅓% *ad val.*
733 132	Reflectors	No.	33⅓% *ad val.*	33⅓% *ad val.*
			cts.	cts.
733 133	Carriers	No.	·80	·80
733 198	Other parts, not elsewhere specified or included	Value	Nil	Nil
733 199	Other accessories, not elsewhere specified or included	Value	20% *ad val.*	20% *ad val.*

Exemption from Customs Duty

THE BOARD OF TRADE have also received a copy of the Customs Duties (Exemption) (Amendment) Order, 1962, which amends Part I of the Customs Duties (Exemption) Order, 1959, by adding the following new item:

No.	Person	Goods Exempted	Conditions	Certificate to be signed by
62	The Importer	Sodium pentachlorophenate.	That the goods are imported solely for use in the rubber industry within the Federation.	The Importer.

Duty on Confectionery Containing Alcoholic Liquor

THE BOARD OF TRADE have been informed that with effect from August 21, 1962, confectionery containing alcoholic liquor would, when entering the Federation of Malaya, be classified as 'alcoholic beverages' and subjected to the rate of duty appropriate to the liquor content (e.g., 'brandy, other,' 'whisky, other' etc.).

Pioneer Industries Ordinance, 1958

THE GOVERNMENT of the Federation of Malaya has announced that the following industry and products have been declared a Pioneer Industry and Pioneer Products under the Pioneer Industries (Relief from Income Tax) Ordinance, 1958:

Industry	Products
Coir manufacture.	(i) Processed coir. (ii) Rubberized coir upholstery and mattresses. (iii) Non-woven coir articles.

The proposal to designate these products was announced in the *Board of Trade Journal* of June 8, 1962 (page 1315).

All inquiries regarding this notice should be made to Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone: Trafalgar 8855, Ext. 2317.) Please quote reference C.R.E. 1236/4/G.

PHILIPPINES

Packing and Labelling Regulations

NEW RULES and regulations governing the packing, labelling, marking or branding of products manufactured in and/or imported into the Philippines have been recently introduced.

Goods of all descriptions for sale or display in the Philippines are now required to have a label giving the following information:

(a) The brand, trade-mark and/or trade name used;
(b) Country of manufacture;
(c) The physical and/or chemical composition;
(d) Metric length and its equivalent, if necessary;
(e) Metric net contents or weight and its equivalent;
(f) Name and address of the manufacturer or repacker.

There are also regulations governing the penalties for failure to comply with these labelling requirements.

Inquiries relating to this notice should be addressed to the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (Telephone: City 5757, Ext. 459.)

Good Business Opportunities in Hong Kong

APART FROM the considerable opportunities there are for increased direct exports to Hong Kong, a great deal of profitable business can be done by British manufacturers willing to take a stake in the Colony's future development. This is one of the conclusions of the British Trade Mission, sponsored jointly by the London and Birmingham Chambers of Commerce, which visited Hong Kong earlier this year.

In its report, the Mission describes the tremendous developments which are taking place in housing, schools, hospitals, hotels, and in the tourist industry. It emphasizes that Hong Kong has become an important industrial area and that it remains a wholesale merchant for Far Eastern territories.

The report says '. . . as there is currently a general shortage of labour in Europe, it would be hard to meet any marked expansion in trade which could result from the full economic association of Britain, EFTA and E.E.C., and, at the same time, maintain exports to the full range of world markets. There therefore appear to be sound reasons to contemplate "hiving off" certain types of manufacturing activity to the Colony and using it as a base for sales in the adjacent territories of the Far East such as Malaya, Borneo, Thailand, Vietnam, Cambodia, the Philippines and Formosa. Nor should it be overlooked that, although China through successive bad harvests has not been a market in recent years, it could re-open as an important one at some time in the future. Heavy industrial production does not appear suitable, but medium and light engineering goods and consumer durables are likely prospects.'

The report points out that, although the value of British direct exports to Hong Kong rose between 1951 and 1961, the progress of some of our competitors, including America and Japan, has been much more marked. It also discusses some of the deficiencies in selling to Hong Kong and suggests points to watch.

Copies of 'Development in Hong Kong', price 2s. 6d. post free, from the Birmingham Chamber of Commerce, 75 Harborne Road, Edgbaston, Birmingham 15, or from the London Chamber of Commerce, 69 Cannon Street, London, E.C.4.

THAILAND

Goods Subject to Import Control

THE MINISTRY of Economic Affairs of the Government of Thailand has issued a revised list of goods, as follows, which are subject to import control. This list supersedes the list published in the *Board of Trade Journal* dated August 25, 1961 (page 431).

Item

1 Gold, namely:
  (a) Gold ore.
  (b) Gold metal either in the forms of bar, block, sheet or other forms or its alloy, but excluding gold ornaments normally used for personal adornment.
2 Sugar, in all forms.
3 Matches.
4 Melon seed (not for seedling).
5 Betel nut.
6 Rattan.
7 Slippers and sandals, chiefly made of straw or having wooden soles.
8 Coconut oil, groundnut oil, and palm oil.
9 Veneer splint.
10 Old newspaper.
11 Fan made of paper or wood, woven or otherwise.
12 Toothpicks.
13 Chopsticks.
14 Firework.
15 Bamboo hat.
16 Mat, chiefly made of rattan, bamboo, coir, grass, or similar materials.
17 Basketwork or other wickerwork (not made of metal).
18 Mortar, pestle and grinding mill made of stone (not for industrial purposes).
19 Mosquito poisoning incense (coil or stick).
20 Paper umbrella, umbrella frame and paper used in umbrella production.
21 Paper file or folder, excluding those used exclusively in filing cabinets.
22 Students' note-book.
23 Joss-paper.
24 Paper for printing or writing as follows:
  (a) Glazed or unglazed woodfree or non-woodfree writing and printing paper with weight from 35 to 120 grams per square metre.
  (b) Newsprint, with weight from 56 to 120 grams per square metre.
  (c) Duplicating paper, with weight not exceeding 120 grams per square metre.
  (d) Imitation art paper, with weight not exceeding 120 grams per square metre.
  (e) Cap paper, with weight from 30 to 120 grams per square metre.
  (f) White linen-faced paper, with weight from 35 to 120 grams per square metre.
25 Wrapping paper, with weight not exceeding 120 grams per square metre, excluding:
  (a) Brown paper imported by cement factories for their own use in making cement bags.
  (b) Ribbed ocean paper.
  (c) Gift-wrapping paper.
  (d) Match and candle wrapping paper in green and blue colour.
  (e) (rtm) Glassine and (Cellophane) paper.
  (f) Greaseproof paper.
  (g) Crepe paper.
26 Printed matters and cinematographic films produced or shipped from Communist China.
27 Gunny bags.
28 Hessian cloth.
29 Potato.
30 Pepper, in all forms.
31 Swallow's nest (edible).
32 Tea leaf and tea dust.
33 Garlic.
34 Fresh fruits.
35 Fresh or frozen meat.
36 Carbonated beverages (not including natural mineral water).
37 Vermicelli made from bean.
38 Fresh water fish.
39 Cotton yarn for weaving under No. 40.
40 Knitted fabric.
41 Cotton piece-goods whether in sheet, piece or roll as follows:
  (a) Pakaoma (loin cloth) or checked printed cloth which can be used as Pakaoma.
  (b) Palai or other printed fabric which can be used as Palai.
42 Grey cotton shirting and poplin, printed and unprinted not including canvas.
43 Bags made of grey cotton shirting.
44 Silk weaving goods, containing more than 50 per cent. of pure silk, whether in piece or in roll.
45 Iron and steel, cut or made into plate, bowl, tray, spoon and number plate.

Item

46 Iron cooking pan (native type with no handle).
47 Ladle, spoon and fork made of aluminium or brass.
48 Tin foil.
49 Enamel-ware as follows:
  (a) Spoon of all sizes.
  (b) Plate of all sizes.
  (c) Bowl of all sizes.
  (d) Tray of all sizes.
  (e) Plates and number plates.
  (f) Electric lamp shade.
  (g) Lunch box with diameter not exceeding 18 centimetres.
  (h) Chamber pots of all sizes.
  (i) Cooking pot with diameter of 10 centimetres up to 32 centimetres.
50 Wolfram ore, tin ore and tin metal, in all forms.
51 Empty iron or steel drum of capacity of 200 litres.
52 Galvanized iron sheet plain and corrugated of 0·190 mm. or less than 0.190 mm. in thickness.
53 Glass tumbler.
54 Bottle with screw lid excluding bottle with glass lid (with-a capacity of one pound or more and with the bottle neck of not less than 6·5 cm. in diameter).
55 Ink erasing solution.
56 Stationery paste and glue.
57 Fluid glue for stationery uses.
58 Rulers made of wood, plastic or other materials, excluding:
  (a) Protractor.
  (b) Right-angle ruler.
  (c) Measuring ruler for technical uses only.
  (d) Measuring instruments other than rulers.
59 Stationery clips and pins.
60 Shuttle-cock.
61 Comb made of wood or plastic except 'saniad' comb.
62 Rubber band.
63 Soap container.
64 Cloth clippers.
65 Dummy for merchandise display.
66 Coat hangers, excluding those attached to suit-case, wardrobe or the like.
67 Resin.
68 Crude oil.
69 Motor tricycles with axle transmission.
70 Acetic alhydride acedil chloride.
71 Canvas shoes, sandals and slippers with rubber soles.
72 Rubber heel and sole.
73 Plywood and fibre board with thickness of ½ inch or lower including other pressed board which can be used as substitution of plywood and fibre board (not including paper board and cement board).
74 Teak (tectona grandis), malabar iron wood (hopea odorata), hopea sp., oil tree (dipterocarpus), yang (dipterocarpus grandiflorus), jarul (lagerstroemia flosreginae), champi or champ (michelia floribunda or aromadendron spongocerpum) imported through the provincial ports of Chiengmai, Chiengrai, Ranong and Tak.
75 Coffee.

In principle, no permit will be granted for the import of goods specified in this list except:

1. **Gold:** (Item 1) – Permits will be granted in accordance with the regulation stipulated by the Ministry of Finance and application for import is to be submitted to that Ministry direct.

2. **Printing and wrapping paper:** (Item 24 and 25) – Import of these items will be granted solely to the National Lottery Bureau. Only import of papers for special uses, such as paper in reel of not more than 4 inches in width and wrapping paper of not exceeding 30 grams per square metre in weight, will be granted to general importers.

3. **Gunny bags:** (Item 27) – Import permits will be granted solely to the Thai Jute Co. Ltd.

4. **Hessian cloth:** (Item 28) – Only import of hessian cloth weighing not more than 13 ounces per sq. yd. is allowed.

5. **Tea leaves and tea dust:** (Item 32) – Importers are allowed to import ten portions of tea leaves or tea dust for every portion of locally produced tea which they agree to buy from the Public Warehouse Organization.

6. **Cotton Yarn:** (Item 39) – Cotton weaving factories are allowed to import cotton yarn No. 20 to No. 39 for their own uses.

7. **Cotton Piece-goods:** (Item 41) – Import of checked printed cloth, which can be used both as sarong and pakaoma but, by its nature, it is not pakaoma, is allowed.

(*Continued on next page*)

Thailand (*Continued*)

Item

8. **Silk weaving goods:** (Item 44) – Import of silk piece-goods for makluadyeing purposes is allowed, provided the quantity of import will not exceed what has been imported in 1960.
9. **Glass tumblers:** (Item 54) – Only import of glass tumblers with c.i.f. value of 36 baht or lower per dozen, is prohibited.
10. **Fluid glue:** (Item 57) – Import of special fluid glue which is for industrial uses only is allowed.
11. **Resin:** (Item 67) – Import of reasonable quantity of resin for industrial uses is allowed.
12. **Acetic Alhydride Acedil Chloride:** (Item 70) – Import of this chemical is allowed if it is made by government offices or by private importers on behalf of the government offices. Private importers will also be allowed to import this chemical if prior approval from the Anti-narcotic Committee has been sought.
13. **Plywood and Fibre Board:** (Item 73) – Import of peg board (plywood and fibre board with holes), the distance between holes of which is not more than one inch, is allowed.
14. **Timbers:** (Item 74) – Permits will be issued through the provincial authorities of the port of importation.
15. **Coffee:** (Item 75) – Permits will be granted to general importers.

FIJI

Freight Rates

THE BOARD OF TRADE have received the following extract from the *Fiji Times* of August 30, 1962, about increased freight rates of shipping companies engaged in the Australian Pacific Islands trade:

'The shipping companies engaged in the Australian Pacific Islands trade have announced that owing to rising costs it has been found necessary to increase freight rates, effective from September 3, 1962.

'General cargo rates will be increased by 15s. (Australian) from Sydney to Fiji, making the new rate 182s. 6d. a ton from Sydney to Suva, and the Melbourne-Suva rate will be 192s. 6d. a ton.

'The Union Steam Ship Company has announced that the new freight rates will not apply to the ship *Kawerau*, which is at present loading in Australia for Fiji.

'Freight rates and passenger fares have been increased in the New Zealand-Pacific Islands trade.

'The Union Steam Ship Company states that general cargo rates from Fiji to New Zealand have been increased by 5s. a ton and banana freight rates by 6d. a case.'

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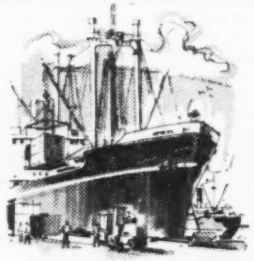

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NORTH BORNEO

Prohibition of Imports

THE NORTH BORNEO Government *Gazette Supplement* of July 2, 1962, contains a copy of the Customs (Control of Imports) Order, 1962, which came into operation on that day. This Order prohibits absolutely the importation of the goods listed in Schedule A below and prohibits the importation, except under either a general or specific Import Licence, the goods listed in Schedule B.

This Order does not apply to goods imported by or on behalf of the Government or by H.M. or Commonwealth Forces.

This notice cancels the notice, and subsequent amendments to it, which appeared in the *Board of Trade Journal* of August 24, 1954 (page 864).

SCHEDULE A

1. Articles bearing false trade marks and false trade descriptions.
2. Brandy which is not accompanied by a certificate issued by the proper customs authority of the country of origin to the effect that it has been stored in wood for a period of not less than three years.
3. Canned food in tin-plate containers:
   (a) of which the ends are inset, unless the ends are attached to the sides by crimped joints and not with solder;
   (b) so constructed that its contents can come in contact with solder other than that used to close a vent hole;
   (c) made of such material or in such a manner as to yield to its contents any lead or other injurious substance;
   (d) which bears any supplementary sealing disc or sealing plate of an area exceeding three square inches:
   Provided that this rule shall not apply to food in tin-plate containers which is so wrapped that it does not come into contact with any metal.
4. Cigarettes marked in any manner other than as approved by the Commissioner.
5. Cosmetics or toilet preparations containing lead or any compound of lead.
6. Coin or disc operated amusement machines, including pin-tables, fruit machines, jack-pot machines, shooting galleries and similar machines and components, and spare parts thereof, but excluding coin and disc operated cinematograph machines.
7. Fabrics and tissues bearing the imprint of currency notes, bank notes or coin.
8. Goods the importation of which is prohibited by or contrary to the provisions of any written law.
9. Intoxicating liquors containing any lead or any compound of lead.
10. Pistols in the form of stylograph pencils.
11. Pornographic literature and objects of an indecent or obscene character.
12. Sand crackers.
13. Whisky which is not accompanied by certificate issued by the proper customs authority of the country of origin to the effect that it has been stored in wood for a period of not less than three years.

SCHEDULE B

1. All goods manufactured wholly or mainly in:
   Albania, Bulgaria, China, Cuba, Czechoslovakia, East Germany, Hungary, North Korea, Poland, Rumania, Tibet, Union of Soviet Socialist Republics, Vietnam.
2. All goods manufactured wholly or mainly in and consigned from Japan.
3. Books, pamphlets, leaflets or any map, chart or plan not having printed legibly on the first or last printed leaf thereof the name and address of the printer and publisher.
4. Rice, whether whole, polished or broken, but excluding glutinous rice.
5. Wheat or wheat flour originating in or consigned from countries other than Argentina, Australia, Canada, France, Italy, Mexico, Spain, Sweden and the United States of America.

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AUSTRALIA

Tariff Board Inquiries

AS ANNOUNCED in last week's *Board of Trade Journal* (page 543) the Australian Minister for Trade has referred to the Tariff Board for inquiry and report the questions whether assistance should be accorded the production of:

(1) **Sunglasses and spectacle frames** (Tariff Items 321(A) (1), 321(A) (2), 321(A) (3), 321(C) (1), 321(C) (2), and 321(C) (3);

(2) **Chicory and preparations** (Tariff Items 43(A) (2) and 43(B) (2));

(3) **Shipbuilding Industry** (Tariff Items 424(A) (1) (a), 424(A) (1) (b), 424(A) (2) (a), 424(A) (2) (b), 424(A) (3) (a), 424(A) (3) (b), 424(B) (1), 424(B) (2), 424(B) (3), 424(B) (4) (a), and 424(B) (4) (b); and,

(4) **Chlorine chemicals** as follows:
- (a) Paradichlorobenzene;
- (b) Orthodichlorobenzene;
- (c) Pentachlorophenol;
- (d) Sodium pentachlorophenate;
- (e) Dichlorodiphenyltrichlorethane;
- (f) 2,4 – dichlorophenoxyacetic acid;
- (g) 2,4,5, – trichlorophenoxyacetic acid;
- (h) Esters and salts of the chemicals of (a) to (g) above; and
- (i) Preparations of the products of (a) to (h) above.

(Tariff Items 280(K) (1) (a), 280(K) (1) (b), 280(K) (1) (c), 280(K) (1) (d), 280(K) (1) (e), 280(K) (2), 280(K) (3), 280(K) (4), 280(K) (5), 280(K) (6), 280(K) (7), 269(A), 269(B), 269(C) (1), 269(C) (2), 269(D), 269(E), 281(L) (1), 281(L) (2) (a) and 281(L) (2) (b)).

Details of Tariff Items 321(A)(1) to 321(A)(3) and 321(C)(1) to 321 (C)(3) and 43(B)(2) are shown below. Details of Tariff Items 43(A)(2), 280(K)(1)(c), 280(K)(1)(d), 280(K)(3) and 280(K)(5) will be published as soon as possible under the heading 'Tariff Changes' but meanwhile, together with the remainder of the Tariff Items listed in (3) and (4) above, they may be obtained from Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (Telephone: City 5757, Extn. 468).

'Specific rates are shown in Australian currency £A125= £Sterling 100'.

Tariff Item	Goods	British Preferential	Most-Favoured-Nation	General
43	Coffee and chicory:			
	(B) (2) Chicory, other than raw or kiln dried; preparations containing chicory . . . per lb.	7d.	7d.	7d.
321	(A) Spectacles (other than X-ray spectacles or fluoroscopic spectacles), sunglasses, and goggles:			
	(1) Wholly or partly of gold or silver (not being included in paragraph (2)) *ad val.*	20%	47½%	52½%
	(2) Rolled gold, gold-filled, gold-cased, gold-plated or gilt, including the articles named when fitted with pads, bridges or knuckles of gold *ad val.*	20%	37½%	42½%
	(3) N.e.i. . . . . *ad val.*	20%	37½%	42½%
	(C) Spectacle frames:			
	(1) Wholly or partly of gold or silver (not being included in paragraph (2)) *ad val.*	20%	35%	52½%
	(2) Rolled-gold, gold-filled, gold-cased, gold-plated or gilt, including such frames when fitted with pads, bridges or knuckles of gold . . *ad val.*	20%	35%	42½%
	(3) N.e.i. . . . . *ad val.*	20%	35%	42½%

This matter has been reported by telegraph by the British Senior Trade Commissioner at Canberra, who has been asked by the Australian authorities to notify them at the earliest possible date if any United Kingdom interests propose to tender evidence. In accordance with normal procedure, notification in this instance should be given to the Australian authorities **not later than September 26, 1962.** Before this date, therefore, United Kingdom Trade Associations or firms intending to submit evidence to the Tariff Board should so advise the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1, quoting reference Nos. (1) C.R.E. 9969/62, (2) C.R.E. 9970/62, (3) C.R.E. 9971/62 and (4) C.R.E. 9975/62.

The Australian Minister for Trade has also referred to the Tariff Board for inquiry and report the questions whether assistance should be accorded the production of:

(1) **Musical instruments, viz.: Drums;** (Tariff Item 363 (A)).

(2) **Electric filament and fluorescent discharge lamps** and glass envelopes thereof. (Tariff Items 181 (D)(1)(a), 181(D)(1)(b), 181(D)(1)(c), 181(D)(2)(a), 250(C)(3)(c)).

Both these references have been made as the result of representations by local manufacturers.

Details of the Tariff Items under which the above-mentioned goods are dutiable are given below:

'Specific rates are shown in Australian currency £A125= £Sterling 100'.

Tariff Item	Goods	British Preferential	Most-Favoured-Nation	General
181	ELECTRICAL ARTICLES AND MATERIALS, viz.:			
	(D) Electric filament lamps and electric discharge lamps (including infra-red and ultra-violet lamps); arc-lamps; electrically ignited photographic flash bulbs:			
	(1) Filament lamps:			
	(a) Provided suitably equivalent lamps the manufacture of Australia are not reasonably available, as prescribed by Departmental By-laws . . . *ad val.*	Free	7½%	7½%
	or per lb.	—	1s. 6d.	1s. 6d.
	whichever rate returns the lower duty.			
	(b) Of types ordinarily used in motor vehicles for lighting purposes .	Free	Free	Free
	(c) Other . . . per lb.	1s.	2s. 6d.	4s.
	(2) Discharge lamps:			
	(a) Fluorescent . . . per lb.	1s.	2s. 6d.	4s.
250	(C) (3) Glass envelopes for electric lamps, electronic valves and the like:			
	*(a) For cathode ray tubes covered by Item 181 (J) (1) (a) . *ad val.*	Free	25%	25%
	*(b) For cathode ray tubes covered by Item 181 (J) (1) (b) . *ad val.*	Free	7½%	7½%
	(c) Other . . . *ad val.*	5%	35%	35%
363	(A) Military band and orchestral musical instruments, viz.: Bassoons; baritones; bombardons; bugles; clarionettes; cornets; cornophones; cor anglais (wood); cymbals; cor tenor (brass); contra bassoon (brass); doblophones; drums; double basses; euphoniums; flutes; fifes; harps; horns, viz., flugel, French, Koenig tenor, and vocal ballad; musette; oboes or hautbois piccoloes; saxophones; trombones; trumpets; tubas; triangles; violins and violoncellos; bagpipes; flageolets . *ad val.*	Free	12½% Primage duty	12½%
		Exempt	5%	10%

Note: These sub-items are for information only; they do not form part of the reference.

This matter has been reported by telegraph by the British Senior Trade Commissioner at Canberra, who has been asked by the Australian authorities to notify them at the earliest possible date if any Unied Kingdom interests propose to tender evidence. In accordance with normal procedure, notification in this instance should be given to the Australian authorities **not later than October 3, 1962.** Before this date, therefore, United Kingdom Trade Associations or firms intending to submit evidence to the Tariff Board should so advise the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1, quoting reference Nos. (1) C.R.E. 10281/62 and (2) C.R.E. 10282/62.

References to the Special Advisory Authority

AS ANNOUNCED in last week's issue of the *Board of Trade Journal* (page 544) a reference has been made to the Special Advisory Authority in respect of chlorine chemicals.

The Australian Minister for Trade has now advised that this consists of two references as follows:

(1) 2,4,5 – trichlorophenoxyacetic acid and preparations containing 20 per cent. or more of 2,4,5 – trichlorophenoxyacetic acid; esters and salts of 2,4,5 – trichlorophenoxyacetic acid, including preparations thereof containing the equivalent of 20 per cent. or more of 2,4,5 – trichlorophenoxyacetic acid – classifiable under Tariff Item 280(K)(3);

(2)(a) Paradichlorobenzene (P.D.C.B.) classifiable under Tariff Item 280(K)(1)(b);

(b) Pentachlorophenol (P.C.P.) classifiable under Tariff Item 280(K)(1)(c);

(c) 2,4–dichlorophenoxyacetic acid (2,4–D) and preparations containing 20 per cent. or more of 2,4–D, esters and salts of 2,4–D including preparations thereof containing the equivalent of 20 per cent. or more of 2, 4–D, classifiable under Tariff Item 280(K)(1)(e);

(*Continued on next page*)

Australia *(Continued)*

(d) Dichlorodiphenyltrichlorethane (D.D.T.) and preparations containing 20 per cent. or more of D.D.T. classifiable under Tariff Item 280(K)(2);
(e) Sodium pentachlorophenate (S.P.C.P.) classifiable under Tariff Item 280(K)(6);
(f) Orthodichlorobenzene (O.D.C.B.) classifiable under Tariff Item 280(K)(7); and
(g) Preparations of pentachlorophenol and/or sodium pentachlorophenate classifiable under Tariff Item 269(A) or (B);

For details of the above mentioned Tariff Items please see page 591 of this issue of the *Board of Trade Journal*.

In the short time available for investigation United Kingdom interests wishing to make their views known to the Special Advisory Authority will no doubt get in touch with their Australian agents or with the London office of the Australian Association of British Manufacturers, 42, Leicester Square, London, W.C.2. (Telephone: Whitehall 5072).

Any inquiries about this notice should be addressed to the Commercial Relations and Exports Department, Board of Trade, Horse Guards Avenue, London, S.W.1. (Telephone: Trafalgar 8855, Extn. 2840 or 3145) quoting reference Nos. (1) C.R.E. 9981/62 and (2) C.R.E. 10064/62.

Special Advisory Authority Inquiry Result

A NOTICE was published in the *Board of Trade Journal* on August 17, (pages 390 and 391) to the effect that a reference had been made to the Special Advisory Authority in respect of cotton and linen handkerchiefs.

The inquiry has now been held and as a result of the Special Advisory Authority's recommendations temporary additional duties of 1d for each 1d or part thereof by which the f.o.b. price in Australian currency is less than 2/9d per dozen have been imposed on ladies and childrens handkerchiefs classifiable under Tariff Item 120 (B) (1) (b).

These additional duties do not apply to goods in transit on or before August 7, 1962, provided they are entered for home consumption on arrival.

Full details will be published as soon as possible.

Specific rates are shown in Australian currency £A125=£100 Sterling.

NEW ZEALAND

Import Licensing Arrangements

THE NEW ZEALAND Customs Department have issued the following particulars of decisions relating to the Import Licensing Schedule for the 1962/63 period (see notices published in the *Board of Trade Journal* of March 23, March 30, April 6 and June 29, 1962.)

1. *Item Code* 67.13: *Iron and Steel Bars, etc.*

The allocation for Item Code 67.13, Iron and steel bars, etc., viz., ⅜ in. but less than ½ in., etc., is amended from 33⅓ per cent. to 55 per cent. 1960 imports same goods under 1960 licences as a transfer from Item Code 67.02.

2. *Item Code* 69.20: *Screws for Wood, etc.*

The allocation for Item Code 69.20 is amended from 25 per cent. 1961 licences to 37½ per cent. 1961 licences. The additional licences now authorized are to be noted 'Not available for self-colour steel screws; applicant should use this licence for types and sizes of wood screws not being made in New Zealand'.

3. *Spare Parts*

It is apparent that considerable problems are being faced by licence-holders in applying for licences under individual item codes to cover the multiplicity of spare parts required for plant and machinery. The basic difficulty arises from the fact that whereas in the past many of the parts have been classified and imported under a substantive licence for the equipment itself, because of reclassification in terms of the new tariff a large number of individual licences are now required.

To avoid possible inconvenience to importers and the Department, it has been decided that:

(a) Importers may elect to obtain their licence entitlement for spare parts under the substantive item code for the machinery or plant in any case where no separate item code is already provided in the Licensing Schedule for spare parts of such equipment. Any licence so issued will be noted available for imports of spare parts only.
(b) Licences for spare parts may be utilized for identifiable parts of the particular plant or machinery and parts which are embraced by the expression 'Parts of general use' as defined in the Customs Tariff. The concession relating to 'Parts of general use' is, however, *intended to cover small incidental values* of such items as gaskets, washers, bearings, bolts, nuts, screws, cotter pins, packing, springs, oil plugs, oil seals, etc., included in an overall shipment of spare parts. *It is not intended to cover commercial shipments* of gaskets, washers, bearings, bolts, nuts, screws, etc., which should be entered under licences held under the substantive item code concerned.
(c) Where a machine is imported with ancillary spare parts of a type permissible under para. (b) above, the licence held for the machine may be utilized to clear both the machine and the parts imported therewith.

This concession is for import licensing purposes only and it is to be clearly understood that the intention is to facilitate the clearance of genuine 'mixed' spare parts for the particular machinery concerned. It is not to cover goods imported in 'kitset' or like form, or shipments of a single class of parts such as propellors, bolts, springs, handles, etc. An 'identifiable' spare part may be regarded as any part catalogued as such in the supplier's catalogue of parts.

COSTA RICA

Customs Tariff and Consumption Tax

BY DECREE No. 3021, published in the Costa Rica *Official Gazette* of August 23, 1962, the following changes have been made in the Costa Rican Customs Tariff:

Tariff No.	Description	Unit	New Duty	Old Duty
			(Colones)	
112-04-03 112-04-04	Distilled alcoholic beverages	Litre	20·00 + 40% *ad val.*	15·00 + 10% *ad val.*
313-01-01	Motor spirit	Gallon	1·71 + 2% *ad val.*	1·31 + 2% *ad val.*

By the same Decree the following changes have been made in the Consumption Tax:

	New Tax	Old Tax
	(Colones)	
Beer:		
On each container of up to 12 ounces of local or imported beer	0·55	0·45
Carbonated soft drinks:		
Per bottle of up to 12 ounces. The Director General of Economy will fix the level of prices to the consumer of the soft drinks affected	0·07	—
Cigarettes, locally manufactured and imported, in packets of 20, as follows:		
(a) Manufactured locally exclusively with locally grown tobacco	0·34	0·20
(b) Manufactured locally with a mixture of locally grown and imported tobacco	0·41	0·26
(c) Manufactured locally exclusively with imported tobacco	0·63	0·43
(d) Imported. If the packets contain more or less than 20 cigarettes the tax will be proportionate with the number contained therein	0·25	No change

DOMINICAN REPUBLIC

Customs Tariff and Tax Changes

BY LAW No. 6009 of August 18, 1962, the following changes have been made in the Dominican Republic Customs Tariff:

Tariff No.	Description	Unit	New Duty	Old Duty
			(R.D. $)	
1084 (f)	Cigarettes of up to 7 cm. in length	Per 1,000	15·00	15·50
(g)	Cigarettes of more than 7 cm. in length but not exceeding 10 cm. in length (Amended description)	Per 1,000	15·50	17·50
	NOTE (2). When cigarettes exceed 10 cm. in length, they shall pay, in addition to the duty indicated in paragraph (g), R.D.$ 15·50 extra per 1,000 for every 7 cms. or fraction thereof in excess of 10 cms. (Additional Note).			

In addition, the combined Import Taxes on imported cigarettes under Law No. 2397 of May 27, 1950, as follows, are cancelled.

Serial No.	Description	Unit	Tax
			(R.D. $)
33	Cigarettes up to 7 cm. long	Per 1,000	6·00
34	Cigarettes over 7 cm. long — for each 7 cm. or part thereof		6·50

CHILE

Modifications of the List of Permitted and Prohibited Imports

Section	Group	Item	Tax Surcharge	Percentage of prior deposit
X	57/58	I Cylinders or tubes for gas under pressure of more than 40 kg. p.s.cm., with valves and control instruments	5	Not yet fixed
		II Cylinders for gases derived from petroleum, with a capacity of more than 150 litres of water	5	,,
		III Containers for products with pressure propellant (aerosol) up to 5 litres capacity	5	,,
X	57/58	I Flow reducers for liquid gases derived from petroleum, with pressure connection	5	,,
		II Flow reducers for liquid gases derived from petroleum with screw connection, with passage of 2,260 litres per hour (80 cu. ft. or 4·5 kg. per hour)	5	,,
XIII	76	Printed catalogues, brochures, fly-sheets and manuals giving explanatory and instructive technical or scientific details regarding the use and handling of foreign-made articles, equipment, or machinery or about services offered by foreign firms, which are sent without charge	20	,,
XIII	79	Equipment for radiocommunication stations, radio amplifying and radio-receiving sets, except television	10	C
XIII	79	Other unspecified tubes for use in radio-receiving and amplifying	5	C
XIV	84	Travellers' cheques	Free	Not yet fixed

ARGENTINA

'Aforo' System for Imports

THE *Board of Trade Journal* of November 10, 1961, gave particulars of the new Argentine regulations providing for the establishment of average valuations (or 'aforos') for imports on which the surcharges and tariffs would be assessed.

Argentine Customs Resolution No. 386 of June 15, 1962, sets out the procedure for establishing these prices. Proposed prices must be submitted through the Chamber or Association for the trade concerned and after study and revision by the Advisory Committee for the Control of Values are considered by the National Customs Administration and published in the 'Price Index Bulletin' on the first and third Friday of each month. Fully documented objections must be submitted within 15 working days of such publication and will be considered by the Advisory Committee and the body proposing the 'aforo' before submission to the National Customs Administration.

The decision of the Administration as to the correct price, which is final, will be published in the Argentine *Official Gazette* and comes into force from the day following publication. The same procedure applies when an 'aforo' is revised except that the new 'aforo' comes into force 60 days after publication in the *Gazette*.

Imports of Potatoes

ARGENTINE GOVERNMENT Decree No. 7,792 of August 7, 1962, suspends the payment of surcharges, customs dues, etc., on the imports of certified seed potatoes in boxes and/or bags, from all sources, whose shipment to Argentina is made up to December 31, 1962. This Decree amplifies Decree No. 6,790 of July 13, 1962 (see *Board of Trade Journal* of August 17, page 394).

BRAZIL

Exchange and Trade Control

INSTRUCTION No. 229 of the Brazilian Superintendency of Money and Credit (SUMOC) dated August 15 has made the following amendments to exchange control procedure:

(a) The 150 day prior deposit payment established by Instruction No. 204 (see *Board of Trade Journal* of March 31, 1961 – page 786) has been reduced to 80 per cent., without interest. The conversion of the deposit to Bank of Brazil Bills has been discontinued but from September 30 the deposit may be reimbursed after 30 days, if the depositor will accept payment in Brazilian Treasury bonds.

(b) The permitted quota of convertible currency available to importers has been reduced to U.S. $30,000 per firm per week.

(c) Financial remittances other than import payments are also subject to a 150 day 80 per cent. deposit, without interest. (See *Board of Trade Journal* of May 18, page 1102, for previous information.)

CANADA

Surcharge on Imports

DETAILS were published in the *Board of Trade Journal* (page 86), of the tariff items affected by the temporary graduated surcharge on imports.

The Canadian Government has now issued Order-in-Council P.C 1962-1195 dated August 24, which amends Schedules A and C by deleting the following tariff items:

Tariff Item	Description
SCHEDULE A	
163 (1)	Wines, of the fresh grape of all kinds, not sparkling, imported in barrels or in bottles, for sacramental purposes, containing not more than 26 per cent. of proof spirit.
SCHEDULE C	
20a	Butter produced from the cocoa bean.
Ex 115	Tuna, frozen, to be processed in Canadian canneries.
353	Aluminium and alloys thereof: (a) Pigs, ingots, blocks, notch bars, slabs, billets, blooms, and wire bars.
379c	Rods of iron or steel, in the coil, not more than 0·375 inch in diameter, when imported by manufacturers of wire for use in the manufacture of wire, in their own factories.
684	Rubber thread, not covered.

In addition tariff item 362c – 'Nickel-plated ware, gilt or electro-plated ware n.o.p.' – is deleted from Schedule A and transferred to Schedule C, thereby reducing the incidence of surcharge from 15 per cent. to 5 per cent.

These deletions or reductions apply to goods imported or taken out

(*Continued on page* 595)

Canada

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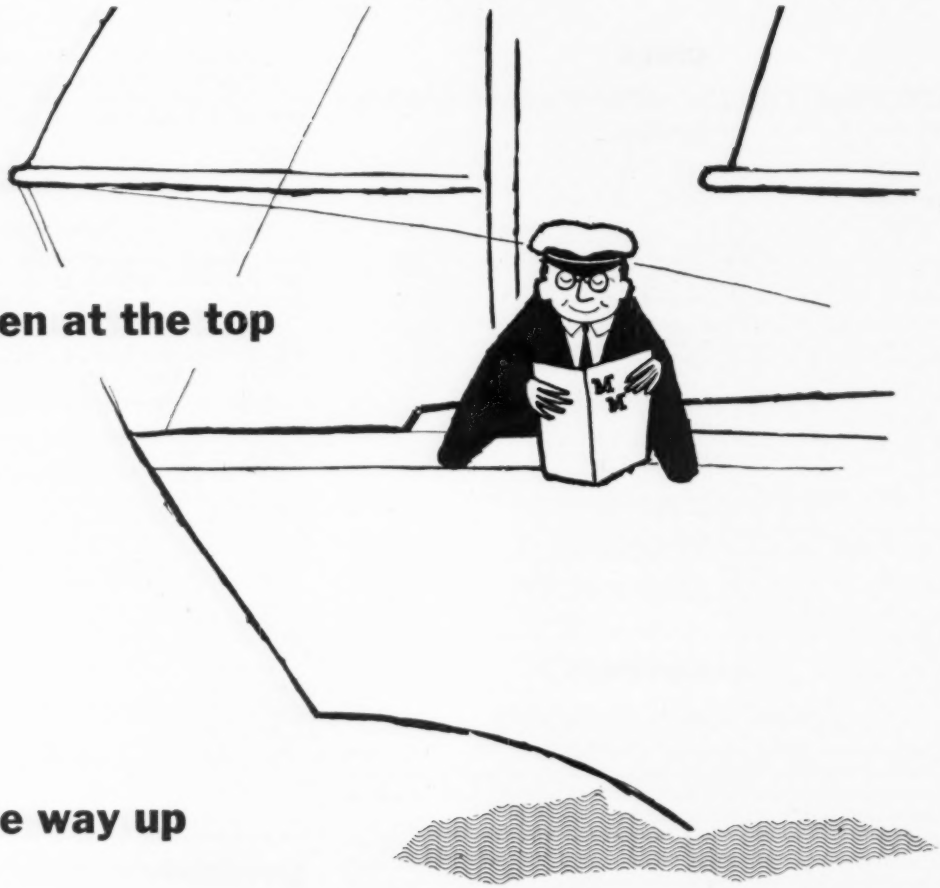
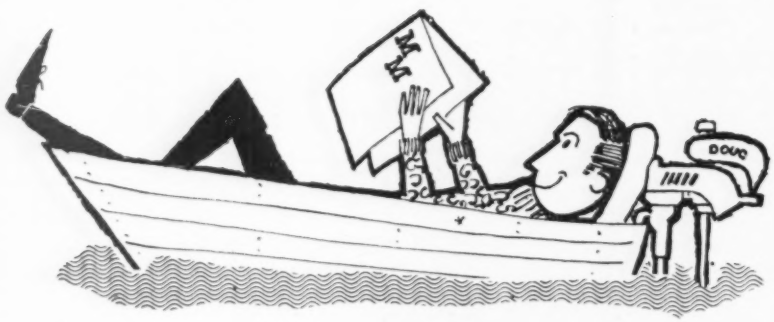


Men at the top

and men on the way up



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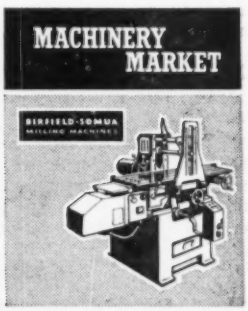

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Canada (*Continued*)

of warehouse for consumption on or after August 24, 1962, and to goods previously imported for which no entry for consumption was made before that date.

The Order-in-Council also gives details of three new tariff items. Full particulars of these tariff items which are not liable to the surcharge are given below.

Tariff Item		British Preferential Tariff	Most-Favoured-Nation Tariff	General Tariff
23a	Cocoa paste or 'liquor' and chocolate paste or 'liquor', not sweetened, other than in blocks, cakes or powder, for use in Canadian manufactures . . . . . and, per pound (Expires June 30, 1963)	15%	25%	35% 2½ cts.
445w	Parts of electric dry shaving machines for use in removing human hair, for use in Canadian manufactures . . . . (Expires June 30, 1963)	Free	Free	10%
562m	Woven fabrics, in the web or with fused edges, wholly of man-made fibres or filaments, for use in the manufacture of sails for boats and ships . . . . (Expires June 30, 1963)	15%	22½%	50%

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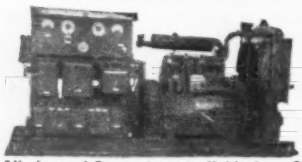

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